ZOHO CRM

USER MANUAL

JANUARY 2010

USER MANUAL

JANUARY 2011

TABLE OF CONTENTS

PART I

SALES FORCE AUTOMATION

In This Section:

- Sales Force Automation in ZCRM
- Lead Management
- Account Management
- Contact Management
- Opportunity Management
- Sales Forecast

CHAPTER 1

INTRODUCTION

In This Section:

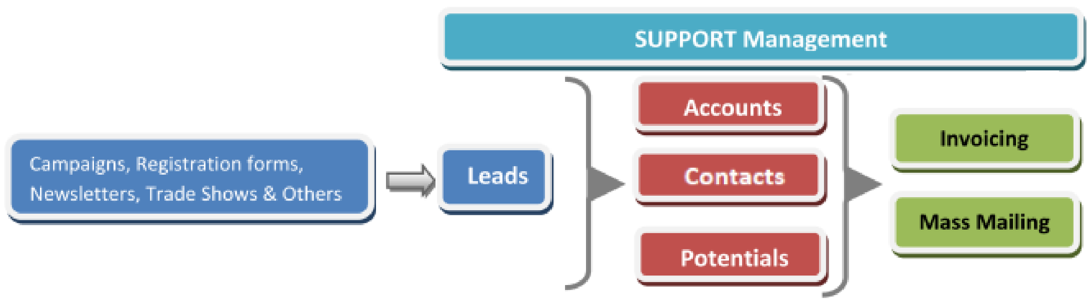
- Introduction to Sales Force Automation

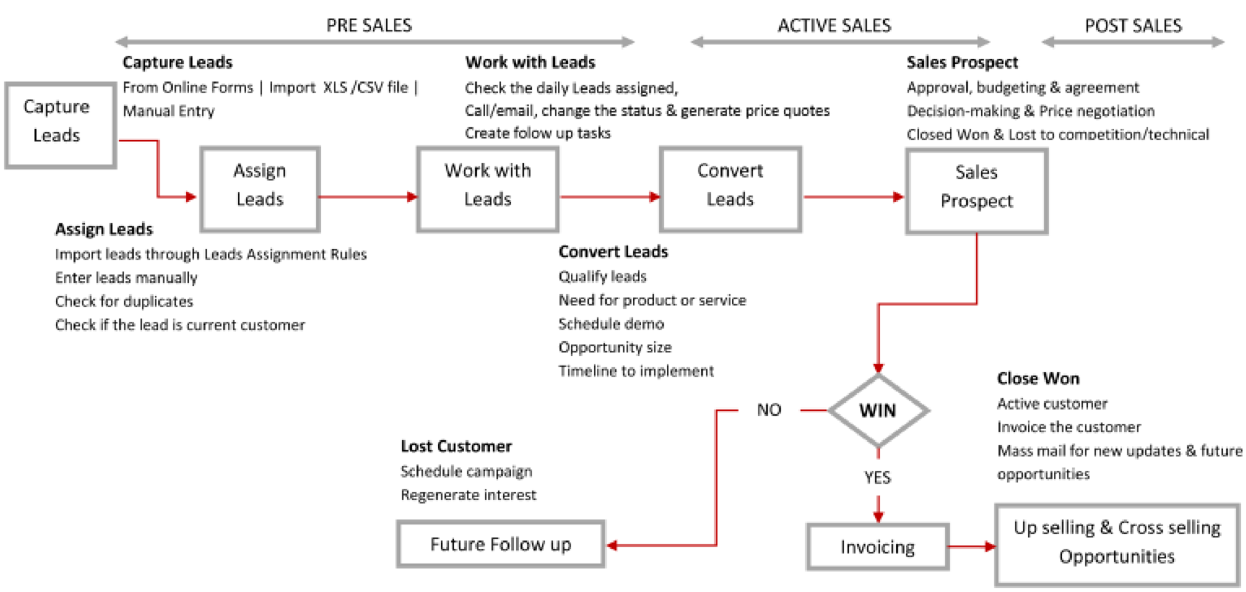
CHAPTER 1

INTRODUCTION

Sales Force Automation

The following workflow briefly explains the sales procedure in Zoho CRM.

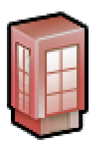




Zoho CRM provides the sales force, executives, and management with sophisticated sales management functions such as: lead generation & qualification, sales pipeline analysis, sales stage & probability analysis; competitor analysis; real-time sales forecasting and other useful metrics. These functions give business an opportunity to completely focus on customer life-cycle (lead generation - acquisition - conversion - retention - loyalty), thus increasing sales revenue.

Zoho CRM has sales force automation modules such as: **Leads, Accounts, Contacts, Potentials,** and **Sales Forecasting**. You can accurately track all business opportunities and close more deals in less amount of time. In addition, you can identify bottlenecks in the sales process in advance and thereby effectively utilize existing customer data for future cross-selling and up-selling opportunities.

Salesforce Automation in Zoho CRM

	**Lead Management** Leads are raw details about individuals or representatives of organizations collected from trade shows, seminars, advertisements and other marketing campaigns. **Create Leads | Associate Leads | Convert Leads | Approve Leads | Lead Assignment Rules**
	**Account Management** Accounts are companies or departments within the companies with which you plan or have business dealings. **Create Accounts | Associate Accounts | Member Accounts**
	**Contact Management** Contacts are people in an organization with whom you communicate in pursuit of a business opportunity. **Create Contacts | Associate Contacts | Approve Contacts | Contact Assignment Rules**
	**Potential Management** Potentials are the business deals with organizations or people that generate real revenue for your organization. **Create Potentials | Associate Potentials | Big Deal Alert | Map Stage & Probability Values**

Forecast Management

Forecasts are factual insight for tracking and fine-tuning the sales process in your organization.

Create Forecasts | Associate Forecasts | Set Fiscal Year

Lead Management

Leads are raw details about individuals or representatives of organizations collected from trade shows, seminars, advertisements and other marketing campaigns. With the Leads module, you can:

- Manage leads end-to-end (from creating leads to converting them into opportunities)
- Capture leads directly from your Web site using Web-to-lead form
- Import leads collected from trade shows, seminars, direct mail, and other types of campaigns
- Set up lead assignment rules to automatically assign leads to the sales force executives in your organization
- Qualify leads to the next stage based on the information captured in lead details. Once leads are qualified for prospecting stage, convert them into sales opportunities, accounts, and contacts with a single click
- Customize lead management process (B2B and B2C business scenarios) as per the organization's sales process
- Standard reports and dashboards bundled for a fast learning curve. You can create fully customizable lead reports and dashboards.
- Export leads data for further analysis

Account Management

Accounts are companies or departments within the companies with which you plan or have business dealings. With the Accounts module, you can:

- Track all accounts and related contacts, opportunities, cases, and other details from a common repository
- Specify parent-child relationships between accounts and their subsidiaries or other divisions
- Generate quotes, sales orders, and invoices for the accounts

- Track purchase history of the customers and analyze opportunities for up-selling and cross-selling opportunities in future
- Identify referrals from accounts and contacts for promoting new products and services
- Store account and contact-related notes and documents in the account history
- Export accounts to analyze the buying patterns of a customers and set up loyalty programs

Contact Management

Contacts are people in an organization with whom you communicate in pursuit of a business opportunity. With the Contacts module, you can:

- Track all contacts and related opportunities, cases, activities, and other details from a common repository
- Create the hierarchy of contacts within a company to have a better coordination while dealing with customers
- Import contacts from external sources, CRM and other business applications
- Export contacts for further analysis
- Synchronize contacts in the Zoho CRM using the Zoho CRM Plug-in for Microsoft Outlook

Opportunity Management

Potentials are the business deals with organizations or people that generate real revenue for your organization. With the Potentials module, you can:

- Track all sales opportunities end-to-end in a sales cycle
- Import Potentials from other Business/CRM solutions and services
- Associate opportunities with accounts, contacts, activities, and other modules to have a better visibility on the opportunities (360 degree view)
- Track competition on each business opportunity
- Analyze the sales stage and probability of winning deals
- Intuitive Sales Funnel chart to analyze the pipeline and eliminate any bottlenecks in the sales cycle
- Alert the intended audience in your organization when a big deal closes (big deal alert) or is nearing completion
- Set up sales escalation process through Workflow rules

- Generate quotes, sales orders, and invoices from the potentials
- Export opportunities to analyze the sales pipeline

Sales Forecast

Forecasts are factual insight for tracking and fine-tuning the sales process in your organization. With the Forecasts module, you can:

- Estimate how much revenue you can generate in each fiscal quarter/year
- Identify the sales persons who met their targets for fiscal quarter/year
- Predict the revenue generation for the forthcoming quarters
- Create fully customizable forecast reports and dashboards

CHAPTER 2

LEAD MANAGEMENT

In This Section:

- Create Leads
- Approve Leads
- Associate to Other Records
- Assignment Rule

CHAPTER 2

LEAD MANAGEMENT

Leads are the details gathered about an individual or representatives of an organization. They play a very important role in an organization's Sales & Marketing department and are useful in identifying potential customers. Collecting leads and managing them are the initial stages in the sales process. Leads can be obtained through trade shows, seminars, advertisements, marketing campaigns etc. Once the leads are collected, it is essential to manage them and follow them up till the leads qualify to prospective customers. The sales department's approach in managing leads can significantly impact the success of an organization.

The terminology related to lead management may differ across industries, but the basic process remains the same. The Leads module in Zoho CRM helps you manage your leads. In Zoho CRM, lead details contain a combination of company (account), person (contact), and business opportunity (potential), depending on your CRM requirement - for managing **Business to Business** (B2B) industry or **Business to Consumer** (B2C) industry.

Availability

Editions	**Enterprise**	**Professional**	**Free**
	YES	**YES**	**YES**
Permission Required	**Leads Tab**		

Lead Management Process

- Customize Leads module in lead page according to your organization's Sales & Marketing processes. (You may use the existing fields, disable some of the standard fields, or add new custom fields.)
- Setup lead generation process by filling the lead form, importing lead data from external sources, or capturing leads directly from your Web site using web-to-lead forms.
- Assign leads to the correct sales persons using the Lead Assignment rules.
- Follow-up with the lead till it reaches a certain stage then convert the lead to potential. While converting leads to potentials, accounts and contacts are created automatically.
- Follow up the leads further in the Potentials module, till the deal is either won or lost.

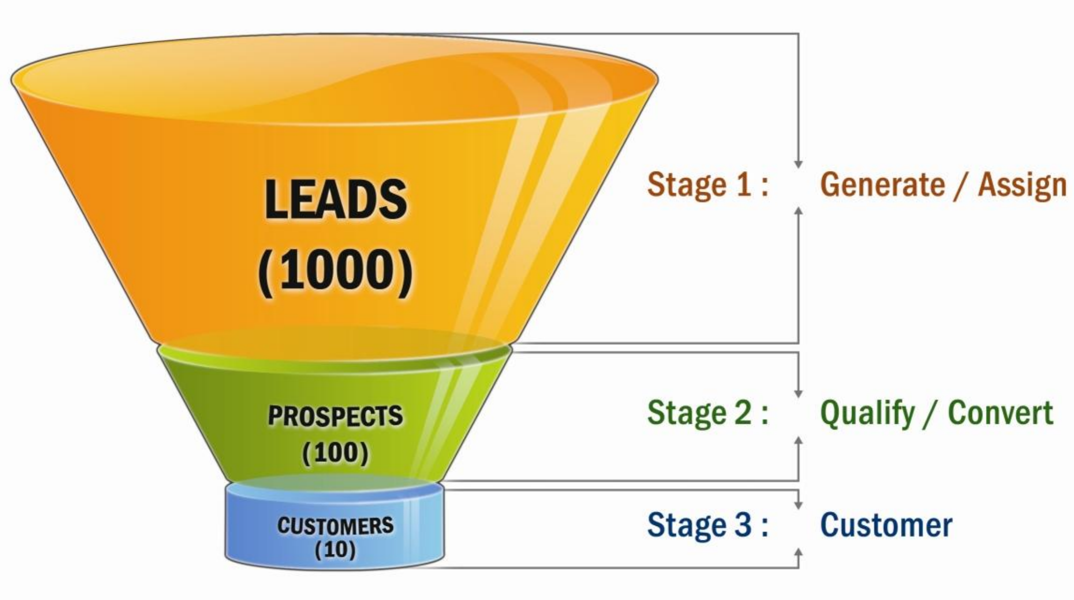


Figure 1: Sales Funnel Diagram

- Every person who signs up with Zoho CRM becomes a lead and probably a prospective customer.
- Once a lead is generated, the Zoho CRM system automatically assigns the particular lead to a sales person, provided the Lead Assignment Rules are defined.
- The sales person performs the validation (or background check) of the lead and analyzes the opportunities that are available. The leads are then filtered based on these opportunities.
- If the opportunities are positive, the lead becomes a potential or a possible customer ("Prospect").
- A Potential becomes a Customer once the deal is finalized.

Note:

- Standard fields in the Leads module are applicable to most of the industries.
- You can add your organization-specific fields by customizing the leads module.
- In Zoho CRM, a lead is a combination of company as well as the person's contact information.

Create Leads

In Zoho CRM, you can create leads by:

- Entering data in lead details form (manually)

- Importing leads from external sources
- Capturing leads from Web site through Web-to-Lead form

Create Leads Individually

You can create leads manually by entering the details in the lead page. For instance: While traveling you met a person who showed some interest in your product/service. You exchanged business card and assured that you would contact him again with more details about the product/service. The next day, you create a lead manually with the available details and contact the person. In such cases, it is easy to manually feed in the available details and create new lead records instantly.

You can create leads individually by:

- Filling details in the lead creation form.
- Using Quick Create option; a quick create component present in the left pane of the Leads Home page.
- Duplicating the lead with few changes in the existing lead details.

Notes:

- By default, the person who creates the lead owns it.
- To change owner, click the Change link in the Lead Owner field from the Lead Details page and select another user.

To create leads individually

1. In the *Leads* module, click **New Lead**.
2. In the *Create Lead* page, enter the lead details.
3. Click **Save**.

To create leads instantly

1. Click the **Leads** tab.
2. On the left pane of the *Home* page, select *Leads* from the **Quick Create** list.

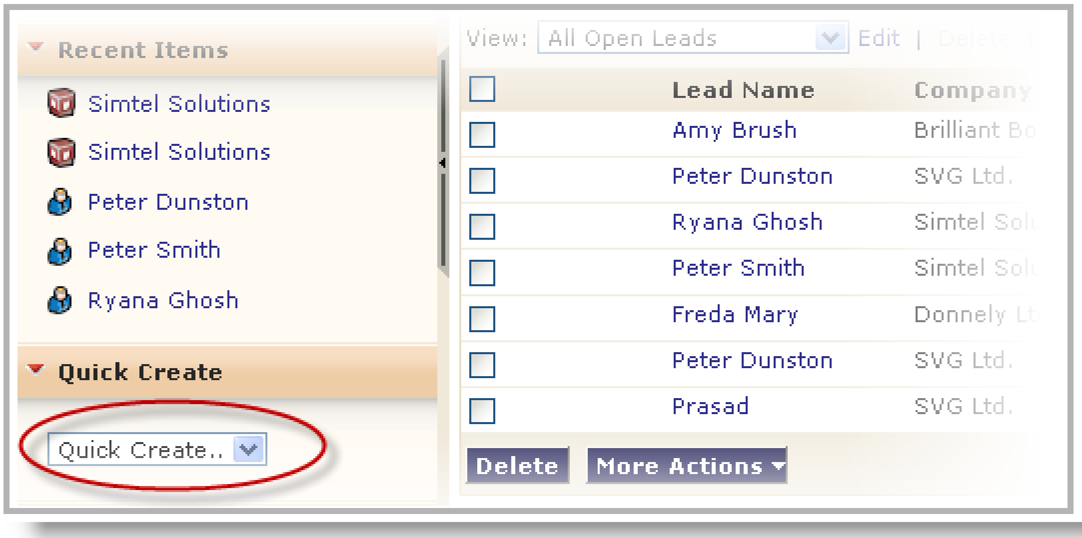


Figure 2: Quick Create

3. In the pop up window, enter the relevant details.
4. Click **Save**.

To create duplicate leads

1. In the **Leads** tab, click a particular lead that is to be duplicated.
2. In the *Lead Details* page, click **Clone**.
3. In the *Clone Lead* page, modify the required details.
4. Click **Save**.

Note: You can also Import Leads and also capture Leads from website using Web-to-Lead form.

Approve Leads Captured through Website

By default, leads captured through Website are assigned to one of the Lead Administrator who can update the leads with additional information and assign it to the corresponding sales person in your organization. It will allow your sales persons to focus mainly on high priority leads (lead that contain correct contact information, and interest on your offering).

Availability

Editions	Enterprise	Professional	Free
	YES	YES	YES
Permission Required	Approve Web-to-Leads		

To approve leads from Website

1. Click the **Leads** tab.
2. In the *Leads Home* page, under *Lead Tools* section and click the **Approve Leads** link.
3. In the *Lead Approval* page, select the leads for approval.
4. Click **Approve**.

Associate Leads with Other Records

The next important thing after creating leads is to follow it up with activities, tasks, e-mails and attachments. Hence, you may need to associate leads with other records, until the lead reaches a certain stage where it can be converted to Potential as per your organization's sales process.

To attach documents

This feature enables you to attach documents, spreadsheets and presentations to the leads. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

To add products

1. In the *Lead Details* page, the existing product details, if any, are displayed.
    - Click **Product Name**, **Product Code**, **P**roduct **Active**, **Manufacturer**, **Support Start Date**, or **Support Expiry Date** links to sort the display order of the records.
    - Click the relevant **Del** link to delete the record.
2. Click **Add Product**.
3. Select the check box(es) corresponding to the product.

   Note, that the products will be available in the list only if you add them using the Products module.
4. Click **Add to Lead**.

To create tasks or events

1. In the *Lead Details* page, the existing task or event details, if any, are displayed.

- Click **Subject**, **Activity Type**, **Status**, **Due Da**te or **Owner Name** links to sort the display order of the records.
- Click the relevant **Edit**, **Del**, or **Close** link to modify, delete, or close the task respectively.

2. Click **New Task/New Event** and specify the relevant details.

Note: Once the activity is over, you can close the activity using the **Close** link.

To send e-mails

1. In the *Lead Details* page, the existing e-mail details, if any, are displayed.
    - Click **Sent Or Received**, **Subject**, **Date** or **Sent By** links to sort the display order of the records.
    - Click the relevant **Del** link to delete the mail details.
2. Click **Send Mail**.
3. In the *Send Mail* page, compose the e-mail message and send it.

   Make sure that the lead has a valid email address.

To add notes

1. In the *Lead Details* page, the existing note details, if any, are displayed.
    - Click **Title**, **Note Content**, **Modified Time**, **Created Time**, or **Owner Name** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the notes respectively.
2. Click **New Note** and do the following:

    a. Enter the **Title**. It is mandatory.

    b. The system displays the name of the lead's **Owner**. Click  to change the owner's name.

    c. Enter the **Note Content** in the text box.
3. Click **Save**.

Convert Leads to Other Sales Records

When the lead status reaches a certain stage, where it can be qualified as a potential(i.e. when there is a chance of further negotiations with the lead), it can be converted into an account, contact, and potential.

Note:

- Once a lead is converted into potential, lead status will be changed to Converted in Leads Home page.
- You can view the list of converted leads by selecting the Converted view mode.
- Once the lead is converted to account, contact and potential, you cannot revert to the original state.

Availability

<table>
<tr><th rowspan="2">Editions</th><th>Enterprise</th><th>Professional</th><th>Free</th></tr>
<tr><td>YES</td><td>YES</td><td>YES</td></tr>
<tr><th>Permission Required</th><td colspan="3">Convert Leads</td></tr>
</table>

Lead Conversion Rule

While converting a lead to a potential first a new account and contact are created with the relevant lead data, and then a new potential is created. The following table provides descriptions of the various fields converted to account, contact, and potential (optional) during lead conversion:

Lead Field	Converted To
Salutation	Contact: Salutation
First Name	Contact Name
Last Name	Contact Name
Company	Account: Name
Designation	Contact: Title
Lead Source	Potential: Lead Source Contact: Lead Source
Industry	Account: Industry
Annual Revenue	Account: Annual Revenue
Assigned To	Account, Contact, Potential: Assigned To
Phone	Account: Phone Contact: Phone

Lead Field	Converted To
Mobile	Contact: Mobile
Fax	Account: Fax Contact: Fax
Email	Contact: Email
Skype ID	Contact: Skype ID
Web site	Account: Web site
Lead Status	User should specify the Potential Stage while converting the lead.
Rating	Potential: Rating
No of Employees	Account: No. of Employees
Email Opt Out	Contact: Email Opt Out
Street	Account: Street Contact: Street
City	Account: City Contact: City
State	Account: State Contact: State
Postal Code	Account: Postal Code Contact: Postal Code
Country	Account: Country Contact: Country
Custom Fields	Users can map their own custom field.

To convert leads to other sales records

1. Click the **Leads** tab.
2. In the *Leads Home* page, select the lead to be converted.
3. In the *Lead Details* page, click **Convert**.
4. In the *Lead Conversion* page, enter the details:

    a. Click  to select the **Assigned To** user name.

b. The system displays the **Account Name**.

If the **Account Name** already exists, you will have an option to select the existing company name or create a new account using the same company name.

c. Enter the **Potential Name**.

d. Enter the **Potential Close Date** or select the date from the calendar displayed.

e. Select the **Potential Stage** from the list.

f. Select the **Contact Role** from the list.

g. Enter the **Amount**.

5. Click **Save**.

Set up Lead Assignment Rules

You can setup lead assignment rules based on your organization-wide lead distribution process so that leads created by importing are automatically assigned to the respective sales team members.

Availability

Editions	Enterprise	Professional	Free
	YES	YES	NO
Permission Required	Manage Leads Assignment Rules		

Workflow of Lead Assignment Rule

- Create lead assignment rule.
- Associate rule entries to the assignment rule
- Select the required assignment rule in lead import tool

Limitations

- You can create up to 20 different lead assignment rules.
- In each assignment rule, you can associate up to 20 different criteria.
- Though you set multiple rules, users can select only one rule at a time.

- Lead assignment rule can be used only for the leads generated through import tool and Web-to-form.
- You cannot assign leads to users if you are creating them manually.

To set up lead assignment rules

1. Click the **Leads** tab.
2. In the *Leads Home* page, under *Lead Tools*, click **Assignment Rules**.
3. In the *Lead Assignment Rule* page, click **Create Rule**.
4. In the *New Rule* page, enter the **Rule Name**.
5. Click **Save**.

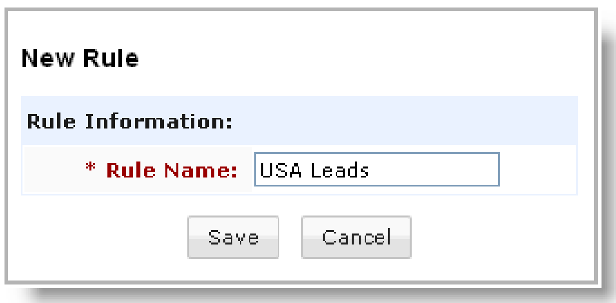


Figure 3: New Rule

6. In the *Lead Assignment Rule* page, click **Create Rule Entry**.

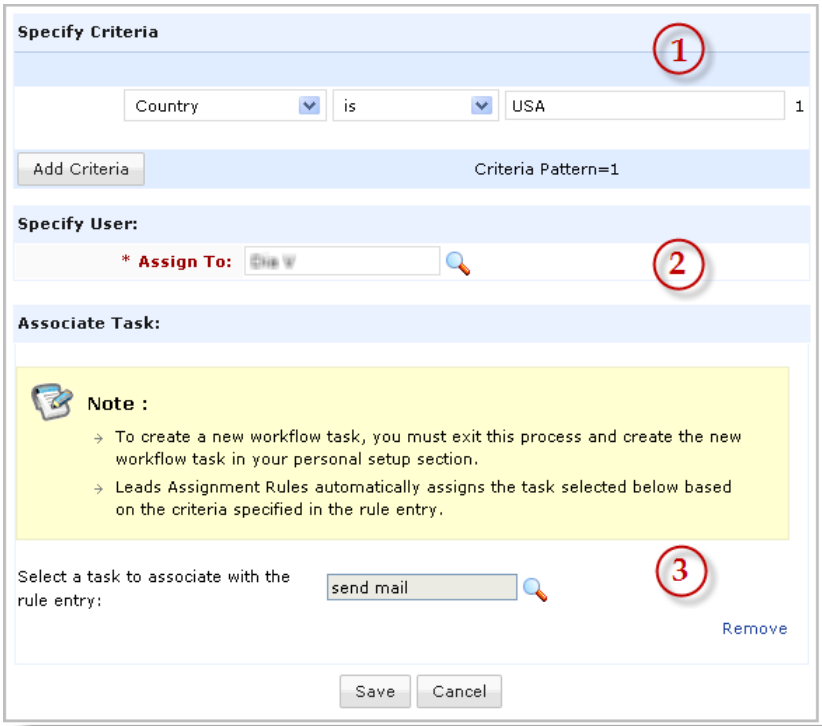


Figure 4: Rule Criteria

7. In the *Rule Entry* page, do the following:

   a. **Specify Criteria**: Select the matching criteria to evaluate the rule.

   b. **Select User**: Select the user to whom the lead has to be assigned.

   c. **Add Task**: Select the work flow task to be assigned.

8. Click **Save**.

   After saving, you can reorder the rule entries (in case there are multiple rule entries) to specify which rule entry needs to be triggered first.

9. In the *Lead Assignment Rule* page, click **Reorder**.

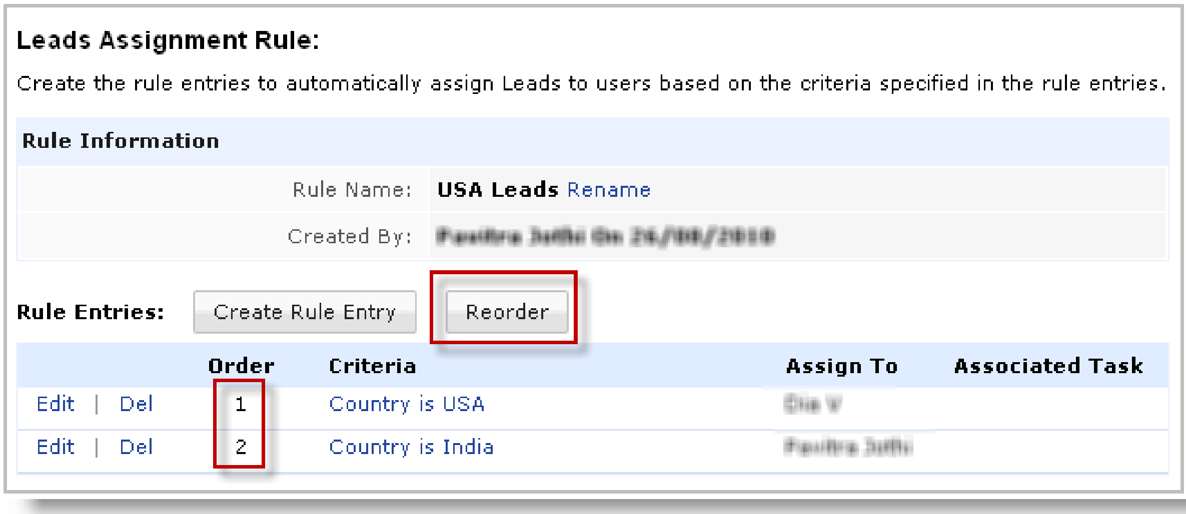


Figure 5: Assignment Rule

10. Specify the **Order** numbers of the rule entries and click **Save**.

    When the assignment rule is triggered, the rule entries will in turn be triggered based on its order.

Map Custom Fields

When a lead is converted into an account, contact and potential, field values of a lead are mapped with the corresponding account, contact, and potential. Only when the fields are accurately mapped with those of the corresponding modules, data will get transferred correctly.

By default, the standard fields are mapped with the corresponding fields of the other modules (Accounts, Contacts, and Potentials). With the lead conversion mapping tool, you can easily map other fields that you create.

To map lead fields with other modules

1. Click **Setup** > **Lead Settings** > **Fields List**.
2. In the *Lead Fields List* page, click **Map Fields**.
3. In the *Custom Field Mapping* page, custom fields are displayed under Lead Fields column.
4. Select the appropriate options from the corresponding lists to map the fields.
5. Click **Save**.

Chapter 3

Account Management

In This Section:

- Create Accounts
- Associate to Other Records

CHAPTER 3

ACCOUNT MANAGEMENT

In a typical Business to Business (B2B) scenario, Account represents a Company or a Department within the company, with which your organization is planning to do business in future. An account stores the company address, number of employees, annual revenue, and other details.

You can associate an account with contacts (persons) within the company and the potentials (business opportunities) during pre-sales. After successful completion of the sales, you can also provide Customer Support & Service through Zoho CRM - Case Management.

Availability

<table>
<tr><th rowspan="2">Editions</th><th>Enterprise</th><th>Professional</th><th>Free</th></tr>
<tr><td>YES</td><td>YES</td><td>YES</td></tr>
<tr><th>Permission Required</th><td colspan="3">Accounts Tab</td></tr>
</table>

Create Accounts

In Zoho CRM, you can create accounts by:

- Entering data in the account details form
- Duplicating the account with a few changes from the existing account details
- Using Quick Create option, a quick create component present in the left pane of the Accounts Home page
- Importing accounts from other Contact Management and CRM applications
- Synchronizing Microsoft Outlook contacts with Zoho CRM (Special case: An account will be created in Zoho CRM while Company Name field is specified in the Microsoft Outlook)
- Converting leads to accounts

Create Accounts Individually

You can create accounts individually by:

- Filling details in the account creation form.

- Using Quick Create option; a quick create component present in the left pane of the Accounts Home page.
- Duplicating the accounts with few changes in the existing account details.

To create accounts individually

1. In the *Accounts* module, click **New Account**.
2. In the *Create Account* page, enter the account details.
3. Click **Save**.

To create accounts instantly

1. Click the **Accounts** tab.
2. On the left pane of the *Home* page, select Accounts from the **Quick Create** list.

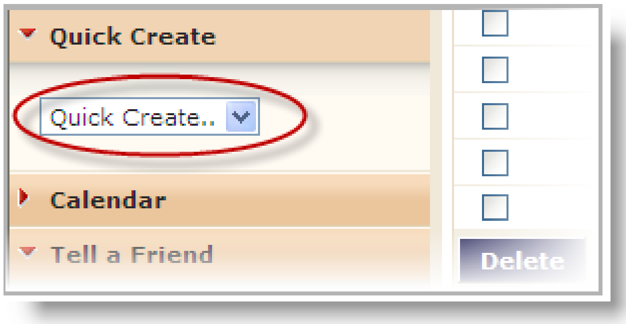


Figure 6: Quick Create

3. In the pop up window, enter the relevant details.
4. Click **Save**.

To create duplicate accounts

1. In the *Accounts* tab, click a particular account that is to be duplicated.
2. In the *Account Details* page, click **Clone**.
3. In the *Clone Account* page, modify the required detail.
4. Click **Save**.

Associate Account with Other Records

You can create a 360 degrees view of the account to display all the associated details, such as contacts, potentials, trouble tickets, activities, attachments, and notes in a single view.

To attach documents

This feature enables you to attach documents, spreadsheets and presentations to the account. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

To create potentials

1. In the *Account Details* page, the existing potential details, if any, are displayed.
    - Click **Potential Name**, **Amount**, **Stage**, **Probability (%)**, **Closing Date**, or Type links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the potentials respectively.
2. Click **New**.
3. Enter the potential details.
4. Click **Save**.

To add products

1. In the *Account Details* page, the existing product details, if any, are displayed.
    - Click **Product Name**, **Product Code**, **Product Active**, **Manufacturer**, **Support Start Date**, or **Support Expiry Date** links to sort the display order of the records.
    - Click the relevant **Del** link to delete the record.
2. Click **New**.
3. Select the check box(es) corresponding to the product.

   The products will be available in the list only if you add them using the Products module.
4. Click **Add to Account**.

To create contacts

1. In the *Account Details* page, the existing contact details, if any, are displayed.
    - Click **Contact Name**, **Email**, **Phone**, **Mobile**, or **Fax** links to sort the display order of the records.

- Click the relevant **Edit** or **Del** link to modify or delete the contacts respectively.

2. Click **New**.
3. Enter the contact details.
4. Click **Save**.

To add notes

1. In the *Account Details* page, the existing note details, if any, are displayed.
    - Click **Title**, **Note Content**, **Modified Time**, **Created Time**, or **Owner Name** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the notes respectively.
2. Click **New Note** and do the following:
    a. Enter the **Title**.
    b. The system displays the name of the account's **Owner**. Click to change the owner's name.
    c. Enter the **Note Content** in the text box.
3. Click **Save**.

To create tasks or events

1. In the *Account Details* page, the existing task or event details, if any, are displayed.
    - Click **Subject**, **Activity Type**, **Status**, **Due Date** or **Owner Name** links to sort the display order of the records.
    - Click the relevant **Edit**, **Del**, or **Close** link to modify, delete, or close the task respectively.
2. Click **New Task/New Event** and specify the relevant details.

Note: Once the activity is over, you can close the activity using the **Close** link.

To create quotes

1. In the *Account Details* page, the existing quote details, if any, are displayed.
    - Click **Subject**, **Quote Stage**, **Valid Till** date, or **Carrier** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the quotes respectively.

2. Click **New**.
3. Enter the relevant details.
4. Click **Save**.

To create sales orders

1. In the *Account Details* page, the existing sales order details, if any, are displayed.
    - Click **Subject**, **Status**, **Customer No.**, **Due Date**, **Excise Date**, or **Sales Commission** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the sales orders respectively.
2. Click **New**.
3. Enter the sales order details.
4. Click **Save**.

To create invoices

1. In the *Account Details* page, the existing invoice details, if any, are displayed.
    - Click **Subject**, **Status**, **Invoice Date**, **Due Date**, **Excise Date**, or **Sales Commission** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the invoice respectively.
2. Click **New**.
3. Enter the invoice details.
4. Click **Save**.

To create cases

1. In the *Account Details* page, the existing case details, if any, are displayed.
    - Click **Subject**, **Case Reason**, **Email**, **Status**, **Priority**, or case **Type** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the cases respectively.
2. Click **New**.
3. Enter the case details.
4. Click **Save**.

Add Member Accounts

Member Accounts are secondary accounts added to an existing parent account. In other words, this allows having separate accounts with different divisions within a parent company, thus providing the scope to view individual accounts as well as the consolidated accounts within the parent account.

To add member accounts

1. In the *Account Details* page, the existing member account details, if any, are displayed.
    - Click **Account Name**, **Phone**, **Website**, **Account Type**, **Industry**, or **Annual Revenue** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the member account respectively.
2. Click **New**.
3. Enter the member account details.
4. Click **Save**.

CHAPTER 4

CONTACT MANAGEMENT

In This Section:

- Create Contacts
- Associate to Other Records
- Approve Contacts
- Assignment Rule

CHAPTER 4

CONTACT MANAGEMENT

Contacts are people with whom you communicate, either in pursuit of a business opportunity or for personal reasons. In Business-to-Consumer (B2C) scenario, contact is the most important information for acquiring customers, whereas in Business-to-Business (B2B) it is a part of the organization details with which you are doing business.

The most important function of contacts module in Zoho CRM is that they can be used for both customers' acquisition as well as procurement of products from the vendors, i.e., contacts can be related to accounts as well as vendors according to your business process.

Availability

Editions	Enterprise	Professional	Free
	YES	YES	YES
Permission Required	Contacts Tab		

Create Contacts

In Zoho CRM, you can create contacts by:

- Entering data in contact details form
- Using Quick Create option, a quick create component present in the left pane of the Contacts Home page
- Duplicating the contact with few changes from the existing contact details
- Importing contacts from other Contact Management applications
- Converting leads to contacts
- Synchronizing Microsoft Outlook contacts with Zoho CRM

Create Contact Individually

You can create contacts individually by:

- Filling details in the contact creation form.

- Using Quick Create option; a quick create component present in the left pane of the Contacts Home page.
- Duplicating the contacts with few changes in the existing contact details.

To create contacts individually

1. In the *Contacts* module, click **New Contact**.
2. In the *Create Contact* page, enter the contact details.
3. Click **Save**.

Notes:

- By default, the person who creates the contact owns it.
- To change owner, click the **Change** link in the Contact Owner field from the Contact Details page and select another user.

To create contacts instantly

1. Click the **Contacts** tab.
2. On the left pane of the *Home* page, select Contacts from the **Quick Create** list.

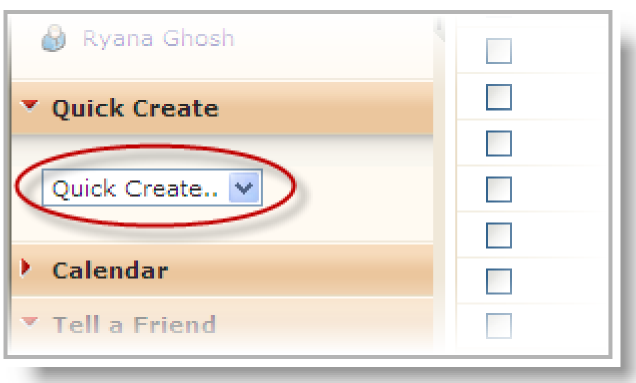


Figure 7: Quick Create

3. In the pop up window, enter the relevant details.
4. Click **Save**.

To create duplicate contacts

1. In the **Contacts** tab, click a particular contact that you want to be duplicated
2. In the *Contact Details* page, click **Clone**.
3. In the *Clone Contact* page, modify the required details.

4. Click **Save**.

Associate Contact with other Records

You can create a 360-degrees view of the contact to display all the associated details, such as potentials, trouble tickets, open activities, history of the completed activities, attachments, and notes.

To attach documents

This feature enables you to attach documents, spreadsheets and presentations to the contact. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

To create potentials

1. In the *Contact Details* page, the existing potential details, if any, are displayed.
    - Click **Potential Name**, **Amount**, **Stage**, **Probability (%)**, **Closing Date**, or **Type** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the potentials respectively.
2. Click **New**.
3. Enter the potential details.
4. Click **Save**.

To add products

1. In the *Contact Details* page, the existing product details, if any, are displayed
    - Click **Product Name**, **Product Code**, **Product Active**, **Manufacturer**, **Support Start Date**, or **Support Expiry Date** links to sort the display order of the records.
    - Click the relevant **Del** link to delete the record.
2. Click **New**.
3. Select the check box(es) corresponding to the product.
4. Click **Add to Contact**.

To add notes

1. In the *Contact Details* page, the existing note details, if any, are displayed.

    - Click **Title**, **Note Content**, **Modified Time**, **Created Time**, or **Owner Name** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the notes respectively.

2. Click **New Note** and do the following:

    a. Enter the **Title**.

    b. The system displays the name of the contact's **Owner**. Click to change the owner's name.

    c. Enter the **Note Content** in the text box.

3. Click **Save**.

To create tasks or events

1. In the *Contact Details* page, the existing task or event details, if any, are displayed.

    - Click **Subject**, **Activity Type**, **Status**, **Due Date** or **Owner Name** links to sort the display order of the records.
    - Click the relevant **Edit**, **Del**, or **Close** link to modify, delete, or close the task respectively.

2. Click **New Task/New Event** and specify the relevant details.

Note: Once the activity is over, you can close the activity using the Close link.

To create quotes

1. In the *Contact Details* page, the existing quote details, if any, are displayed.

    - Click **Subject**, **Quote Stage**, **Valid Till** date, or **Carrier** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the quotes respectively.

2. Click **New**.
3. Enter the relevant details.
4. Click **Save**.

To create sales orders

1. In the *Contact Details* page, the existing sales order details, if any, are displayed.

- Click **Subject**, **Status**, **Customer No.**, **Due Date**, **Excise Date**, or **Sales Commission** links to sort the display order of the records.
- Click the relevant **Edit** or **Del** link to modify or delete the sales orders respectively.

2. Click **New**.
3. Enter the sales order details.
4. Click **Save**.

To create invoices

1. In the *Contact Details* page, the existing invoice details, if any, are displayed.

    - Click **Subject**, **Status**, **Invoice Date**, **Due Date**, **Excise Date**, or **Sales Commission** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the invoice respectively.

2. Click **New**.
3. Enter the invoice details.
4. Click **Save**.

To create cases

1. In the *Contact Details* page, the existing case details, if any, are displayed.

    - Click **Subject**, **Case Reason**, **Email**, **Status**, **Priority**, or case **Type** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the cases respectively.

2. Click **New**.
3. Enter the case details.
4. Click **Save**.

To create purchase orders

1. In the *Contact Details* page, the existing purchase order details, if any, are displayed.

    - Click **Subject**, **Status**, **Tracking Number**, **Due Date**, **Excise Date**, or **Sales Commission** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the purchase orders respectively.

2. Click **New**.

3. Enter the purchase order details.
4. Click **Save**.

To send e-mails

1. In the *Contact Details* page, the existing e-mail details, if any, are displayed.
   - Click **Sent Or Received**, **Subject**, **Date** or **Sent By** links to sort the display order of the records.
   - Click the relevant **Del** link to delete the mail details.
2. Click **Send Mail**.
3. In the *Send Mail* page, compose the e-mail message and send it.

   Make sure that the contact has a valid e-mail address.

Approve Contacts Captured through Website

By default, contacts captured through Website are assigned to one of the Administrators who can update the data with additional information and assign to the corresponding sales person in your organization.

Availability

Editions	**Enterprise**	**Professional**	**Free**
	YES	**YES**	**YES**
Permission Required	**Approve Web-to-Contacts**		

To approve contacts from Website

1. Click the **Contacts** tab.
2. In the *Contacts Home* page, under *Contact Tools* section, and click the **Approve Contacts** link.
3. In the *Contact Approval* page, select the contacts for approval.
4. Click **Approve**.

Set up Contact Assignment Rules

You can setup contact assignment rules based on your organization-wide contact distribution (based on sales territories) process so that contacts generated through import tool and web-to-contact form are automatically assigned to the respective sales team members.

Availability

Editions	Enterprise	Professional	Free
	YES	YES	NO
Permission Required	Manage Contacts Assignment Rules		

Contact Assignment Workflow

- Create contact assignment rule.
- Associate rule entries to the assignment rule
- Select the required assignment rule in contact import tool/web-to-contact form

Note:

- While importing, first assignment rule is evaluated and then assigned to the Zoho CRM users according to the matching criteria.

Limitations

- You can create up to 20 different contact assignment rules.
- In each assignment rule, you can associate up to 20 different criteria.
- Though you set multiple rules, users can select only one rule at a time.
- Contact assignment rule can be used only for the contacts generated through import tool and Web-to-contact form.
- You cannot assign contacts to users if you are creating manually.

To set up contact assignment rules

1. Click the **Contacts** tab.
2. In the *Contacts Home* page, under *Contact Tools* section, select **Assignment Rules**.
3. In the *Contact Assignment Rule* page, click **Create Rule**.

4. In the *New Rule* page, enter the **Rule Name**.
5. Click **Save**.

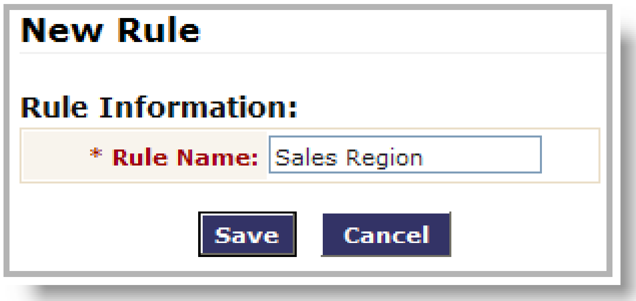


Figure 8: New Rule

6. Click **Create Rule Entry**. The system displays the Rule Entry page.

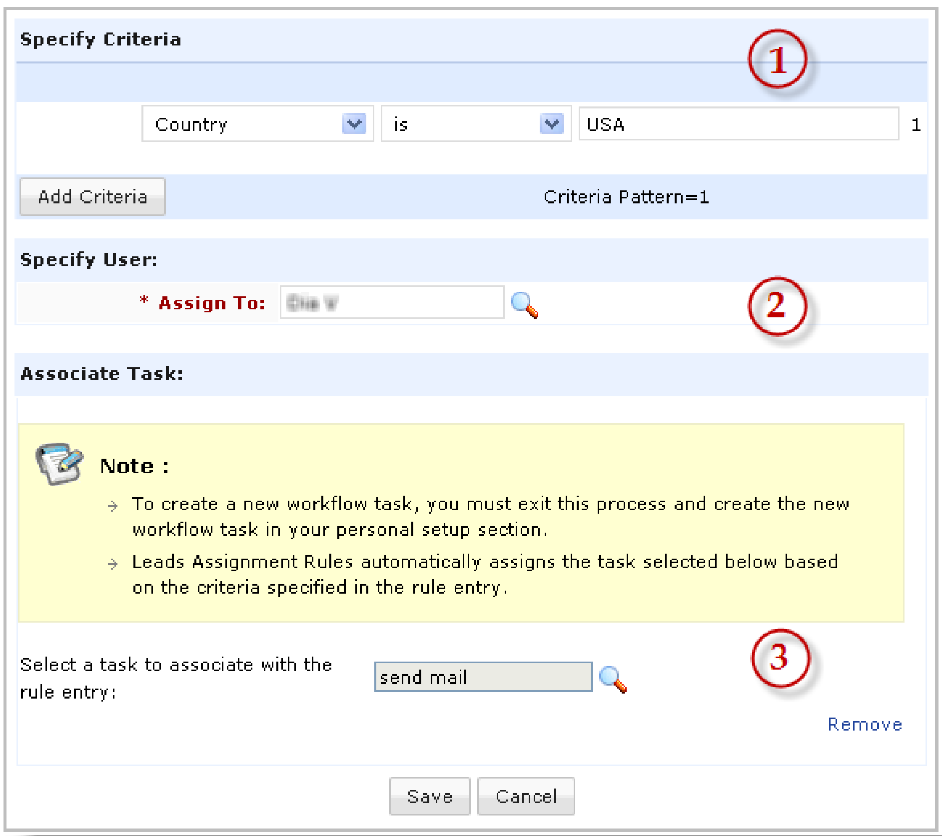


Figure 9: Rule Criteria

7. In the *Rule Entry* page, do the following:

- **Specify Criteria**: Select the matching criteria to evaluate the rule.
- **Select User**: Select the user to whom the contact has to be assigned.

- **Add Task**: Select the workflow task to be assigned.

8. Click **Save**.

   After saving, you can reorder the rule entries (in case there are multiple rule entries) to specify which rule entry needs to be triggered first.

9. In the *Contact Assignment Rule* page, click **Reorder**.

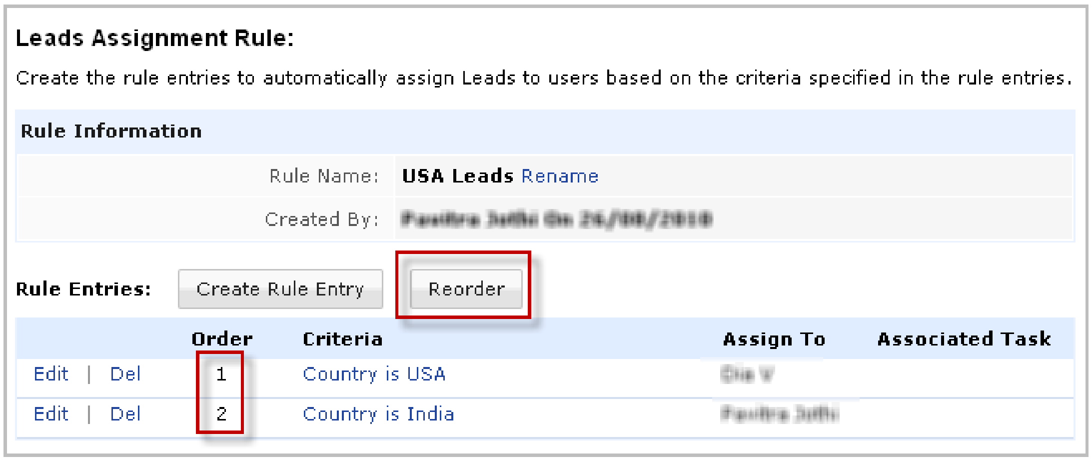


Figure 10: Assignment Rule

10. Specify the **Order** numbers of the rule entries and click **Save**.

    When the assignment rule is triggered, the rule entries will in turn be triggered based on its order.

CHAPTER 5

POTENTIAL MANAGEMENT

In This Section:

- Create Potentials
- Associate to Other Records
- Set up Big Deal Alert
- Map Stage & Probability Values

CHAPTER 5

POTENTIAL MANAGEMENT

In any sales organization, potentials are the most important records to generate the real revenue for the organization. In a typical B2B organization all potentials have to undergo a complete sales cycle, which starts with identifying the hot prospect and ends with prospects being won or lost. The activities within this sales cycle that has to be completed are; sending product information to potentials, product demonstrations, sending sales quotations and business negotiations. Precisely, potential provides the following information for the sales management:

- Sales cycle
- The potential sales volume (Product units and price)
- The sales status and the estimated sales probability in each sales stage
- Reasons for the sales status (Won/Lost)
- Competitors of the potential
- Forecast for the next quarter/year sales

Availability

<table>
<tr><th rowspan="2">Editions</th><th>Enterprise</th><th>Professional</th><th>Free</th></tr>
<tr><td>YES</td><td>YES</td><td>YES</td></tr>
<tr><th>Permission Required</th><td colspan="3">Potentials Tab</td></tr>
</table>

Create Potentials

In Zoho CRM, you can create potentials by:

- Entering data in potential details form
- Importing potentials from other sales force automation applications
- Converting Leads into potentials

Create Potentials Individually

You can create potentials individually by:

- Filling details in the potential creation form.
- Using Quick Create option; a quick create component present in the left pane of the Potentials Home page
- Duplicating the potential with a few changes from the existing potential details

To create potentials individually

1. In the **Potentials** module, click **New Potential**.
2. In the *Create Potential* page, enter the potential details.
3. Click **Save**.

To create potentials instantly

1. Click the **Potentials** tab.
2. On the left pane of the *Home* page, select Potentials from the **Quick Create** list.

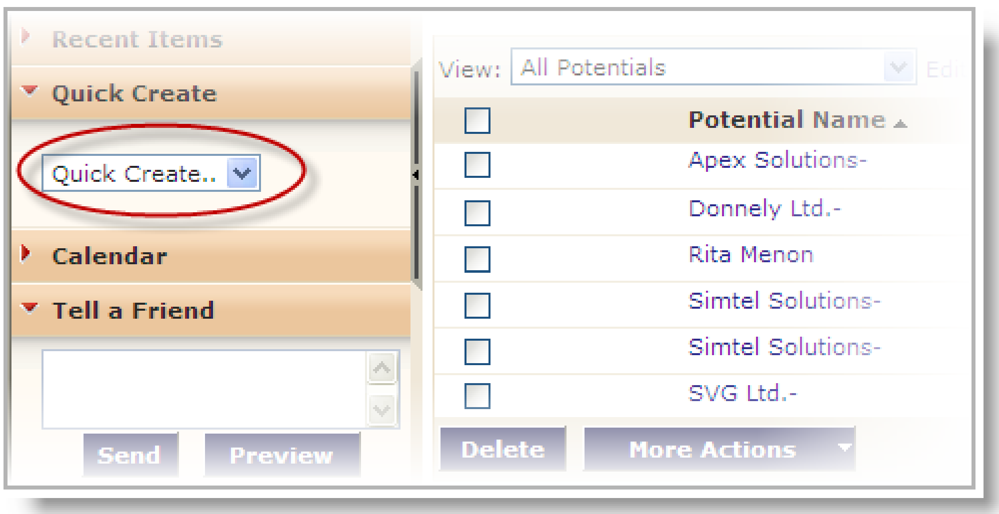


Figure 11: Quick Create

3. In the pop up window, enter the relevant details.
4. Click **Save**.

To create duplicate potentials

1. In the **Potentials** tab, click a particular potential that is to be duplicated.
2. In the *Potential Details* page, click **Clone**.
3. In the *Clone Potential* page, modify the required details.
4. Click **Save**.

Associate Potentials with Other Records

You can create a 360-degrees view of the potential to display all the associated details, such as open activities, history of the completed activities, contacts, products, sales stage history, attachments, and notes.

To attach documents

This feature enables you to attach documents, spreadsheets and presentations to the potentials. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

To add products

1. In the *Potential Details* page, the existing product details, if any, are displayed.
    - Click **Product Name**, **Product Code**, **Product Active**, **Manufacturer**, **Support Start Date**, or **Support Expiry Date** links to sort the display order of the records.
    - Click the relevant **Del** link to delete the record.
2. Click **Add Product**.
3. Select the check box(es) corresponding to the product.

   Note, that the products will be available in the list only if you add them using the Products module.
4. Click **Add to Potential**.

To create tasks or events

1. In the *Potential Details* page, the existing task or event details, if any, are displayed.
    - Click **Subject**, **Activity Type**, **Status**, **Due Date** or **Owner Name** links to sort the display order of the records.
    - Click the relevant **Edit**, **Del**, or **Close** links to modify, delete, or close the task respectively.
2. Click **New Task/New Event** and specify the relevant details.

Note: Once the activity is over, you can close the activity using the **Close** link**.**

To send e-mails

1. In the *Potential Details* page, the existing e-mail details, if any, are displayed.

    - Click **Sent Or Received**, **Subject**, **Date** or **Sent By** links to sort the display order of the records.
    - Click the relevant **Del** link to delete the mail details.

2. Click **Send Mail**.
3. In the *Send Mail* page, compose the email message and send it.

    Make sure that potential has a valid email address.

To add notes

1. In the *Potential Details* page, the existing note details, if any, are displayed.

    - Click **Title**, **Note Content**, **Modified Time**, **Created Time**, or **Owner Name** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the notes respectively.

2. Click **New Note** and do the following:

    a. Enter the **Title**.

    b. The system displays the name of the potential's **Owner**. Click to change the owner's name.

    c. Enter the **Note Content** in the text box.

3. Click **Save**.

To create quotes

1. In the *Potential Details* page, the existing quote details, if any, are displayed.

    - Click **Subject**, **Quote Stage**, **Valid Till** date, or **Carrier** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the quotes respectively.

2. Click **New**.
3. Enter the quote details.
4. Click **Save**.

To create sales orders

1. In the *Potential Details* page, the existing sales order details, if any, are displayed.

- Click **Subject**, **Status**, **Customer No.**, **Due Date**, **Excise Date**, or **Sales Commission** links to sort the display order of the records.
- Click the relevant **Edit** or **Del** link to modify or delete the sales orders respectively.

2. Click **New**.
3. Enter the sales order details.
4. Click **Save**.

To create cases

1. In the *Potential Details* page, the existing case details, if any, are displayed.
    - Click **Subject**, **Case Reason**, **Email**, **Status**, **Priority**, or case **Type** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the cases respectively.
2. Click **New**.
3. Enter the cases details.
4. Click **Save**.

Associate Competitors with Potential

Most of the companies prefer to purchase products after analyzing different vendors. If you are working with a highly competitive market, where your competitors are directly competing with you in winning the deals, it is always better to know their strengths and weaknesses well in advance so that you can propose your offering in a better way.

This feature enables you to add the competitor's strengths and weaknesses.

To associate competitors with potential

1. In the *Potential Details* page, the competitor details, if any, are displayed.
    - Click **Product Name**, **Product Code, Product Active**, **Manufacturer**, **Support Start Date**, or **Support Expiry Date** links to sort the display order of the records.
    - Click the relevant **Del** link to delete the record.
2. Click **New** and do the following:
    a. Enter the **Competitor Name**. It is mandatory.
    b. Enter the competitor's **Website**.
    c. Enter the **Strengths** and **Weaknesses** in the respective text boxes.

3. Click **Save**.

Map Contact Roles

While prospecting, you may need to contact different persons (contacts) to finalize the sales deal. It is always better to know the contact's role in your prospecting organization, so that you always have a right discussion with the right person. For example, explaining about product price and discounts is always better with Financial Manager, whereas explaining product features with the Product Manager. This kind of approach helps you to negotiate with the prospecting organization in a better way and cut short the sales lead-time.

To map contact roles

1. Click the **Potentials** tab.
2. In the *Potentials Home* page, select the required potential.
3. In the *Potential Details* page, the contact details, if any, are displayed.
    - Click **Contact Name**, **Phone**, **Email**, or **Role Name** links to sort the display order of the records.
    - Click the relevant **Del** link to delete the record.
4. Click **Add Contact Role**.
5. In the *Contact Roles Mapping* page, for each contact select the role from the **Contact Role** drop-down list.
6. Click **Save**.

Customize Contact Roles

By default, some of the contact roles, such as Decision Maker, Product Management, Purchasing and other roles are available. You can customize the contact roles according to your business process. Only users with Administrator privilege can customize the contact roles.

To add/modify contact roles

1. Click the **Setup** > **Potential Settings** > **Contact Roles**.

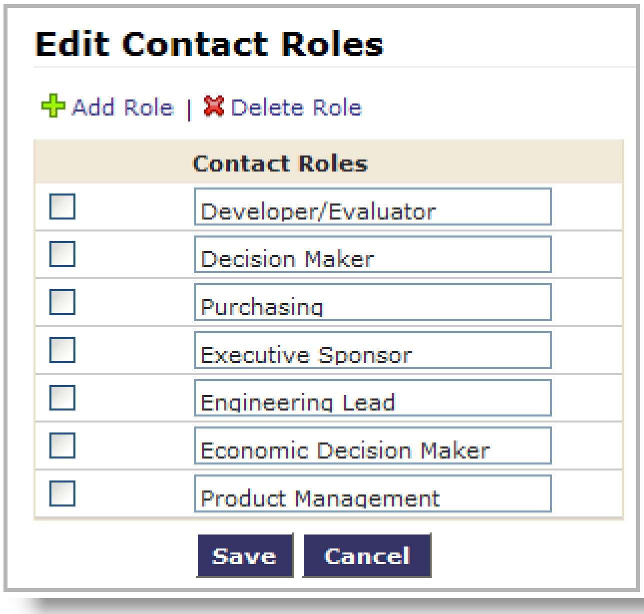


Figure 12: Contact Roles

2. In the *Edit Contact Roles* page, do the following:

    a. Click the **Add Role** link and enter the new contact role.

    b. Select the required check box(es) that you want to delete, and then click the **Delete Role** link.

    c. Modify the existing roles.

3. Click **Save**.

Set up Big Deal Alert

You can use the Big-deal Alert function to notify your management/Colleagues about a chance of winning a big deal that you would like to share with them. Sometimes, executive board members may be interested to know all the Big-deal information well in advance. You can send the Big-deal alert as an e-mail notification to all the Zoho CRM users or to the selected users and colleagues not registered as Zoho CRM users.

To configure big deal alert

1. Click **Setup** > **Potentials Settings** > **Big Deal Alert**.
2. In the *Workflow Rule* page, the **Big Alert** rule details are displayed. The default criteria is "**Amount >= 1000 and the probability = 100**".
3. Click **Edit** to modify the *Rule Details*.

4. In the *Related Alerts* section, the alert details are displayed.

   The default alert and e-mail template is "Big Deal Alert". You can change the Alert details by editing the existing alert.

5. In the *Related Tasks* section, you can add tasks for the alert rule.

Configure Sales Stage Pick list

To add or modify pick list value

1. Click **Setup** > **Potentials Settings** > **Field List**.
2. In the *List of Fields* page, click the **Edit** link corresponding to the fields.

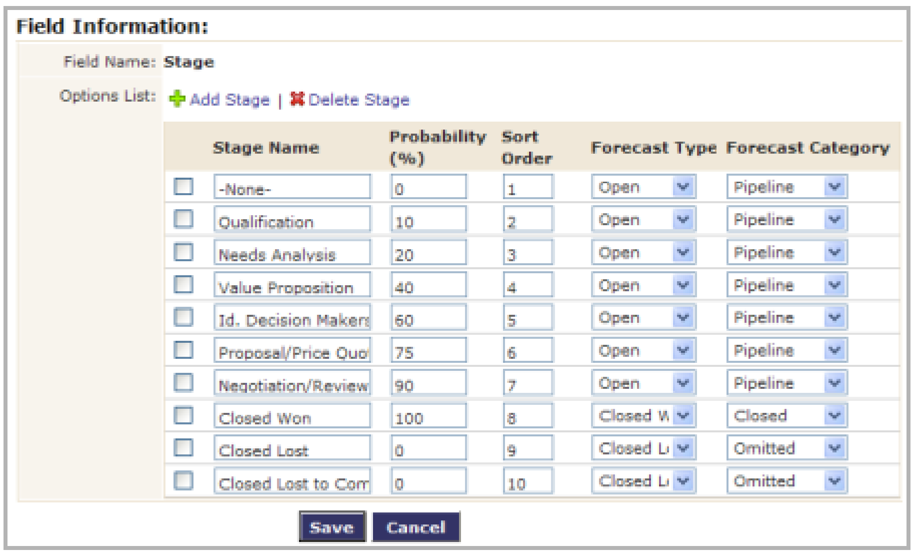


Figure 13: Field Information

3. The system displays the existing pick list values.
4. Modify the existing details, and then click **Save**.

Note: You can modify the default stage for new and converted leads.

Map Stage and Probability Values

Sales Stage is a very important criteria to identify the performance of organization-wide Sales pipeline. In the Stage-Probability mapping page you can perform the following operations:

- Create different types of Sales stages according to your organization-wide Sales process
- Associate Probability values to the Sales stages

- Associate Forecast types (Open, Closed-won, or Closed-lost) to Sales stages
- Associate Forecast categories (Pipeline, Closed, Omitted, Best Case, Committed

Tips:

- For a better sales pipeline analysis assign different probabilities to sales stage values.
- For each stage assign probability in the range of 0 to 100.
- You may consider using probability value as 100 when the deal is closed-won and 0 for deal closed-lost.

To map sales stage to probability values, forecast types and forecast categories

1. Click **Setup** > **Potentials Settings** > **Stage-Probability Mapping**.
2. In the *Stage-Probability Mapping* page, the existing sales stages are displayed.
    - Click the **Add Stage** link and add new stages.
    - Click the **Delete Stage** link and delete new stages.
3. In the *Stage-Probability Mapping* page, do the following:
    a. Enter the **Stage Name**, its **Probability (%)**, and the **Sort Order** in the respective boxes.
    b. Select the **Forecast Type** and the **Forecast Category** from the respective lists.
4. Click **Save**.

CHAPTER 6

FORECAST MANAGEMENT

In This Section:

- Create Forecasts
- Associate to Other Records
- Set up Fiscal Year

CHAPTER 6

FORECAST MANAGEMENT

Forecasting provides real-time insight for tracking the sales against quotas, probabilities, plans, etc., which helps the organization to fine-tune the sales process. For sales managers, forecast feature provides an overall picture of the company's sales pipeline, as well as those of individual staff performance. Sales representatives can use forecasting to meet/exceed quotas assigned to them and in turn increase company profits.

Note: In Zoho CRM, you cannot consolidate the individual sales persons' forecasts and provide the organization-wide forecast.

Availability

Editions	**Enterprise**	**Professional**	**Free**
	YES	**YES**	**NO**
Permission Required	**Forecasts Tab**		

Create Forecasts

In Zoho CRM, you can create forecasts for a financial year and for each quarter by entering data manually.

You can create forecast for a specific quarter only once. For example, if you create a forecast for Quarter 1 in Year 2006, then you cannot create another forecast in the same quarter. You can only modify the existing quarter details.

Note: You cannot customize the fields in forecast module.

To create forecasts

1. In the *Forecast* module, click **New Forecast**.
2. In the *Create Forecast* page, enter the forecast details.
3. Click **Save**.

Set up Fiscal Year

This option allows you to configure the Fiscal Year Settings according to you organization's Fiscal cycle. Once the Fiscal start month is selected, fiscal quarters are automatically rolled up.

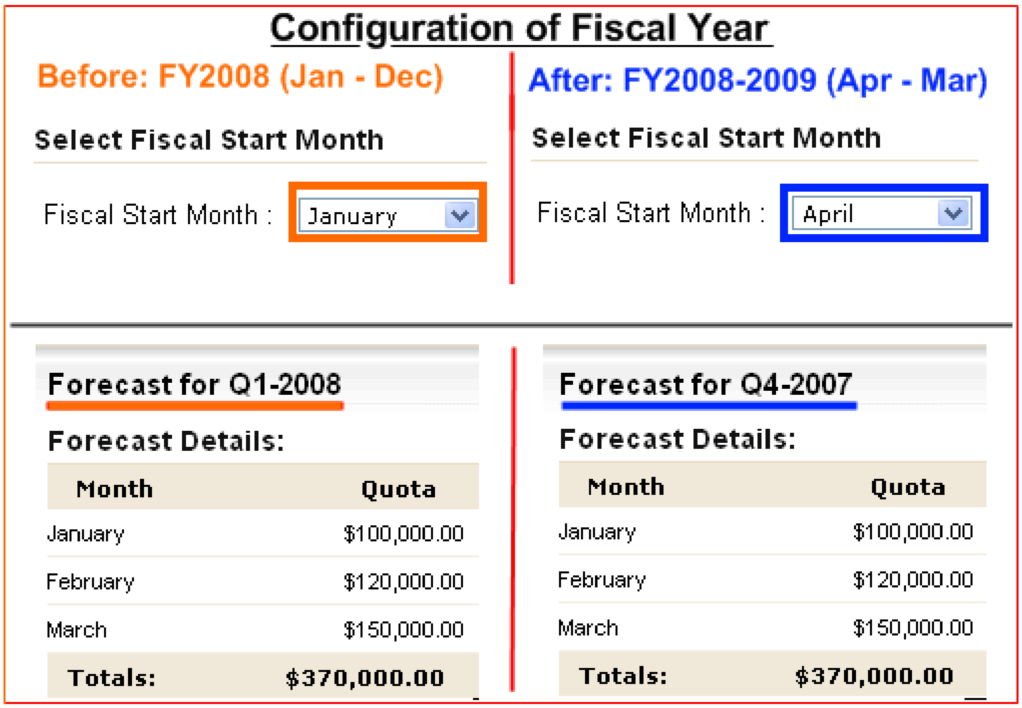


Figure 14: Fiscal Year

Note: By default, fiscal year is configured as January to December**.**

To set up Fiscal Year

1. Click **Setup** > **Admin Settings** > **Fiscal Year**.
2. In the *Fiscal Year* page, select the **Fiscal Start Month** from the drop down list
3. Click **Submit**.

Note that changing the **Fiscal Start Month** will affect the following:

- The new, as well as the existing forecast records
- The settings configured for Financial year and Financial Quarter in Reports and Dashboards

Associate Forecasts with Other Records

After creating forecasts, you can add potentials in each month. Once the potential is closed it is automatically displayed under forecast history. All the potentials created followed-up are displayed under sales person's monthly forecast list.

To associate forecast with other records

1. In the Forecast Details page, the following details are displayed:

   - **Potentials' list for specific months**: Displays the list of potentials and the corresponding forecast details for a month. You can also add new potential to the month.

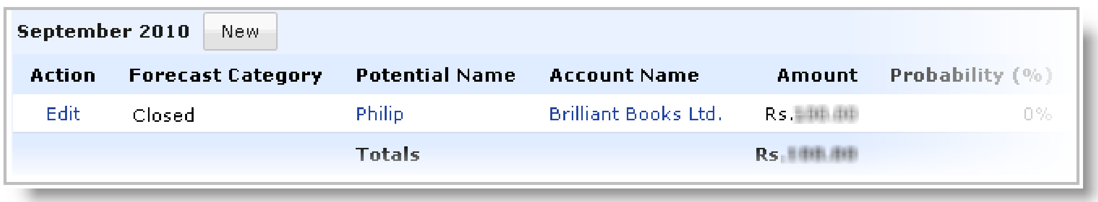


Figure 15: Potentials' List

   - **Forecast History**: Displays the overall details of the forecast with aggregate **Quota**, **Closed Amount**, **Committed Amount**, **Best Case Amount** details.

PART II

MARKETING AUTOMATION

In This Section:

- Marketing Automation in ZCRM
- Campaign Management
- Web Forms
- Auto-Response Rules
- Email Marketing
- Autoresponders

CHAPTER 7

INTRODUCTION

In This Section:

- Introduction to Marketing Automation

CHAPTER 7

INTRODUCTION

As part of the marketing automation, Zoho CRM provides Campaign management, E-mail marketing, and Web Forms (to generate leads, contacts, and cases) useful for integrating your organization's sales and marketing activities.

With the Zoho CRM campaign management features, you can effectively plan marketing expenditure and thereby improve the quality of lead generation process. In addition, campaign management integrated with leads and opportunities modules helps your organization in measuring the campaign performance and effectiveness.

	**Campaign Management** Campaigns refer to the marketing process which is planned, executed, distributed and analyzed.. **Create Campaigns | Associate Campaigns**
	**Web Forms** Web forms will help you to capture leads contacts and cases online. **Create Web Forms | Insert Captcha | Auto Response Rules**
	**Email Marketing** Use emails to reach numerous customers by sending mass emails and use autoresponders to follow up with the customers. **Mass Emails | Schedule Mass Emails | Autoresponders | Autoresponder Scenario**

CHAPTER 8

CAMPAIGN MANAGEMENT

In This Section:

- Create Campaigns
- Associate to Other Records

CHAPTER 8

CAMPAIGN MANAGEMENT

Campaign management allows you to manage your entire marketing process by which marketing campaigns are planned, produced, distributed and analyzed. This includes planning the campaign, preparing your mailing list, executing the campaign and then analyzing the results.

Availability

Editions	Enterprise	Professional	Free
	YES	YES	YES
Permission Required	Campaigns Tab		

You can use the Campaigns module for the following:

- Planning marketing activities and developing campaign hierarchies.
- Outlining marketing campaign objectives.
- Defining campaign success metrics.
- Building and testing sample campaigns on a subset of customer data.
- Storing and reusing content from previous marketing campaigns.
- Measuring campaign effectiveness by linking directly to the leads and potentials.
- Tracking customer inquiries related directly to campaigns.
- Tracking sales force closures related directly to campaigns.

Create Campaigns

In Zoho CRM, you can create campaigns by:

- Entering data in the campaign details form (manually)
- Using Quick Create option; a quick create component present in the left pane of the Campaigns Home page.
- Duplicating the campaigns with few changes in the existing details.

To create campaigns individually

1. In the **Campaigns** module, click **New Campaign**.
2. In the *Create Campaign* page, enter the campaign details.
3. Click **Save**.

To create campaigns instantly

1. Click the **Campaigns** tab.
2. On the left pane of the *Home* page, select **Campaigns** from the **Quick Create** list.

Figure 16: Quick Create

3. In the pop up window, enter the relevant details.
4. Click **Save**.

To create duplicate campaigns

1. In the **Campaigns** tab, click a particular campaign that is to be duplicated.
2. In the *Campaign Details* page, click **Clone**.
3. In the *Clone Campaign* page, modify the required details.
4. Click **Save**.

Associate Campaign with Other Records

After creating campaigns, you may need to associate campaigns with other records, such as tasks, events, attachments, leads, contacts, and potentials.

To attach documents

This feature enables you to attach documents, spreadsheets and presentations to the leads. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

To create tasks or events

1. In the *Campaign Details* page, the existing task or event details, if any, are displayed.
    - Click **Subject**, **Activity Type**, **Status**, **Due Date** or **Owner Name** links to sort the display order of the records.
    - Click the relevant **Edit**, **Del**, or **Close** link to modify, delete, or close the task respectively.
2. Click **New Task**/**New Event**/**Log a Call** and specify the relevant details.

Note: Once the activity is over, you can close the activity using the **Close** link.

To create leads

1. In the *Campaign Details* page, the existing lead details, if any, are displayed.
    - Click **Name**, **Company**, **Email**, **Lead Source**, or **Status** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the leads respectively.
2. Click **New**.
3. Enter the lead details.
4. Click **Save**.

To create contacts

1. In the *Campaign Details* page, the existing contact details, if any, are displayed.
    - Click **Contact Name**, **Email**, **Phone**, **Mobile**, or **Fax** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the contacts respectively.
2. Click **New**.
3. Enter the contact details.

4. Click **Save**.

To create potentials

1. In the *Campaign Details* page, the existing potential details, if any, are displayed.
    - Click **Potential Name**, **Amount**, **Stage, Probability (%)**, **Closing Date**, or **Type** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the potentials respectively.
2. Click **New**.
3. Enter the potential details.
4. Click **Save**.

CHAPTER 9

WEB FORMS

In This Section:

- Web Forms
- Auto-Response Rules

CHAPTER 9

WEB FORMS

Web forms simplify the process of capturing visitors' or users' information from the website into your CRM system. They are designed to automate importing of data from website into Zoho CRM and to enable non-technical users to design and publish their own web forms.

Before setting the web form, ensure the following check-list:

- Create a default Email template to send automated replies to website visitors upon submission of their details.
- Create an Assignment rule if you wish to assign the incoming records to specific users. By default, all incoming records are assigned to the Administrator.
- Configure the Web form further, to suit your requirements. By default, the web form contains only web related tags.
- Customize the fields to be added in the web form.
- Test the entire workflow of Web form, before publishing in the Website.

Availability

Editions	**Enterprise**	**Professional**	**Free**
	20/module	**10/module**	**1/module**
Permission Required	**Web-to-Leads/Contacts/Cases**		

Benefits

- Web forms can be used to:
- Capture data (visitors' information)
- Communicate with website visitors
- Conduct surveys
- Respond to user queries
- Generate online sales
- Receive online feedback

Create Web Forms

To create web forms for Leads, Contacts, and Cases

1. Click **Setup**.
2. In the **Setup** page, under **Leads/Contacts/Cases Settings**, click the **Web-to-Leads/Contacts/Cases Form** link.
3. In the **Web to Lead/Contact/Case** page, click **Create New Form**.
4. Specify the corresponding details in the following sections:

    - Form Properties
    - Field Selection
    - Lead/Contact/Case Assignment
    - Email Notification
    - Generate Web Form

Step 1: Form Properties

1. Enter a **Form Name** (eg. Feedback form, Data form, etc.).

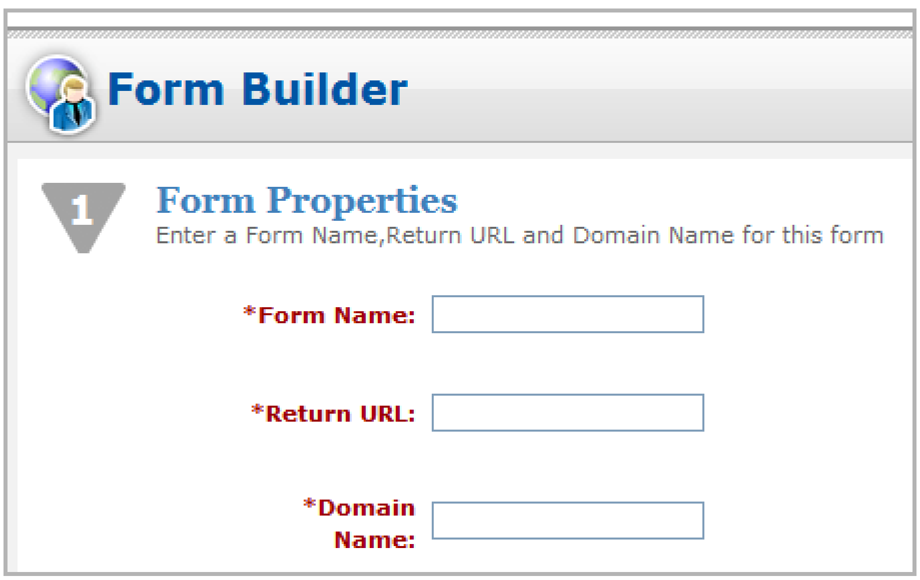


Figure 17: Form Properties

2. Enter the URL of the web page to which the visitor needs to be redirected once the web form is submitted. Specify a valid Return URL starting with "http:// or https://".
   Note: The length of Return URL should not exceed 50 characters.
3. Enter the URL of the website where the web form is to be hosted. It should start with "http:// or https://".
   This prevents spam and allows only forms submitted through the particular domain to be captured as valid information

Note:

- If the domain name does not match with the URL where the web form is hosted, then the information will not be captured.
- Alternatively, you can enter [*] in the domain name field to capture from other / multiple domains.

Step 2: Fields Selection

1. Select the fields' check boxes that are to be displayed in the web form.

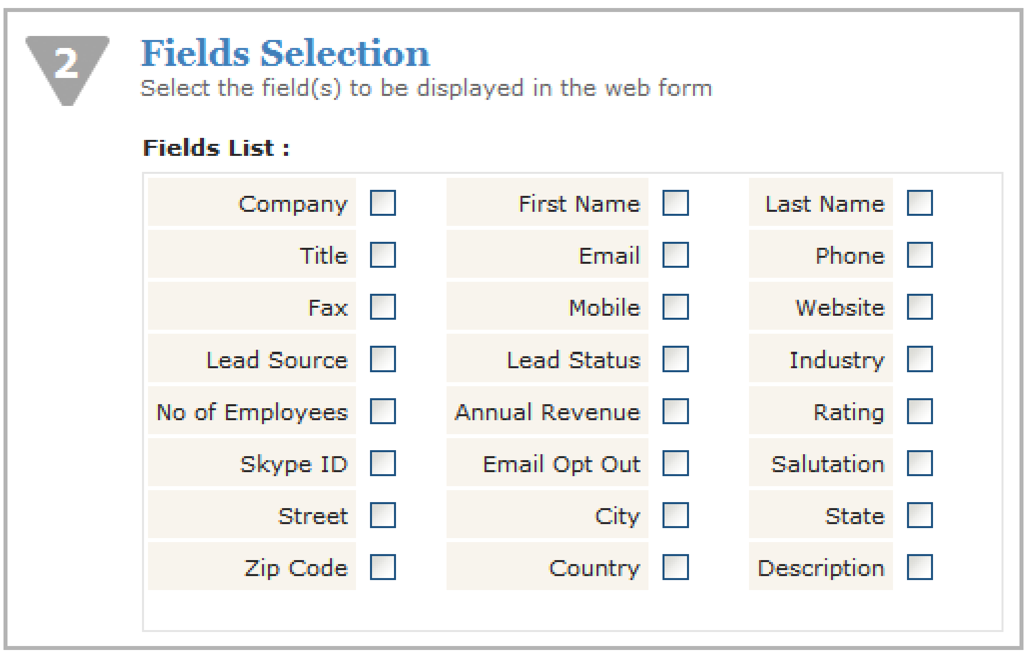


Figure 18: Field Selection

Note:

- The fields displayed here are those available in the particular module's (Leads/Contacts/Cases) Field list.

- To have custom field, you need to first create them in the particular module.

For Web to Contact form:- Account Name is available while creating Web to Contact forms. When this field is used in the web form, and contact details are submitted, an Account will automatically be created in CRM. There can be cases when the Account already exists in your CRM account. **Only in such cases, a new Account will not be created.**

Note: An Account will be created, even if certain mandatory fields details are not provided. Later, when the account is edited, you need to provide the other mandatory details before saving the record.

Step 3: Lead/Contact/Case Assignment

Note: The option to select Assignment Rules to assign owners to the records, is available only in Paid Editions.

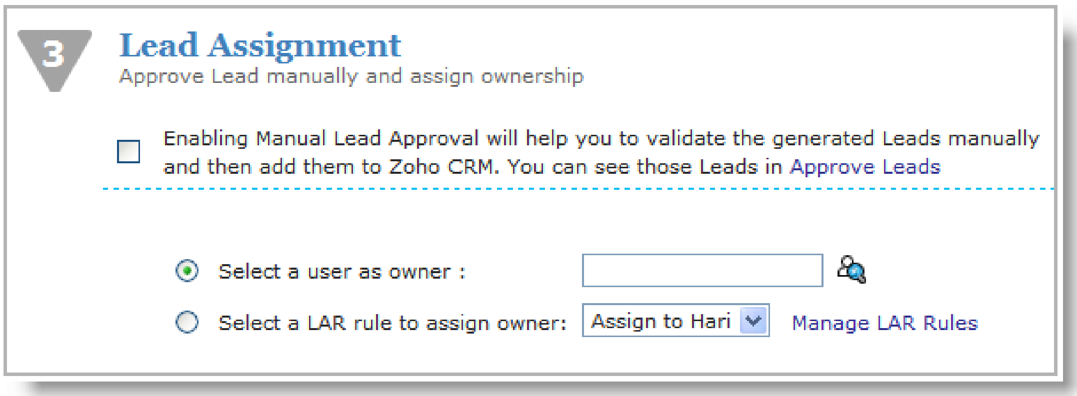


Figure 19: Lead Assignment

1. Select the check box to enable manual approval of records generated through the web form.
2. Click to select a user as owner to the records.
3. Select the **Lead Assignment Rule** from the list.
4. Click **Manage Rules** link to edit the corresponding assignment rule.

Note:

- Enabling Manual record approval will help you to validate the generated records manually and then add them to the corresponding module in Zoho CRM. If not enabled, all the records generated through website are assigned directly to the corresponding modules.
- You can setup Zoho CRM to automatically assign users for the records generated from website by selecting the Select User option or by creating Assignment rules.

Step 4: Email Notification

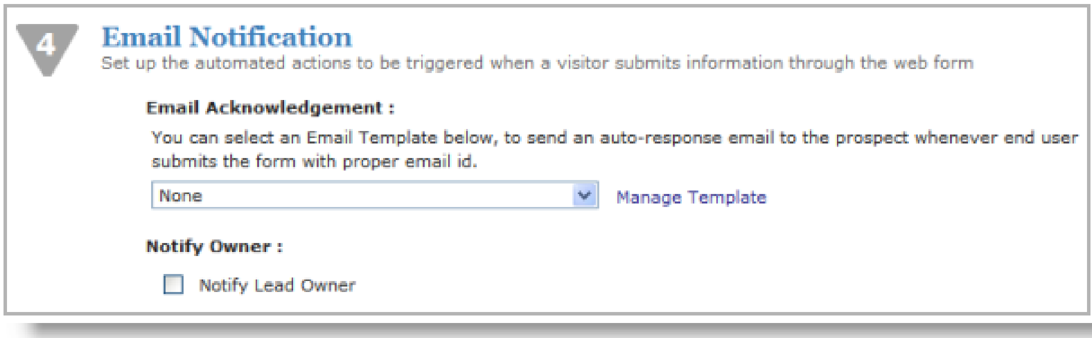


Figure 20: Email Notification

1. Select the email template from the list.

   The template that you select will be used to send an auto-response email to the user who submits the form.
2. Select the **Notify Owner** checkbox to send an email to the owner, when a record is generated through your Website.

Note: While creating web to case forms, there will be an extra option to Enable Contact Creation when cases are generated using the web forms.

Step 5: Generate Web Form

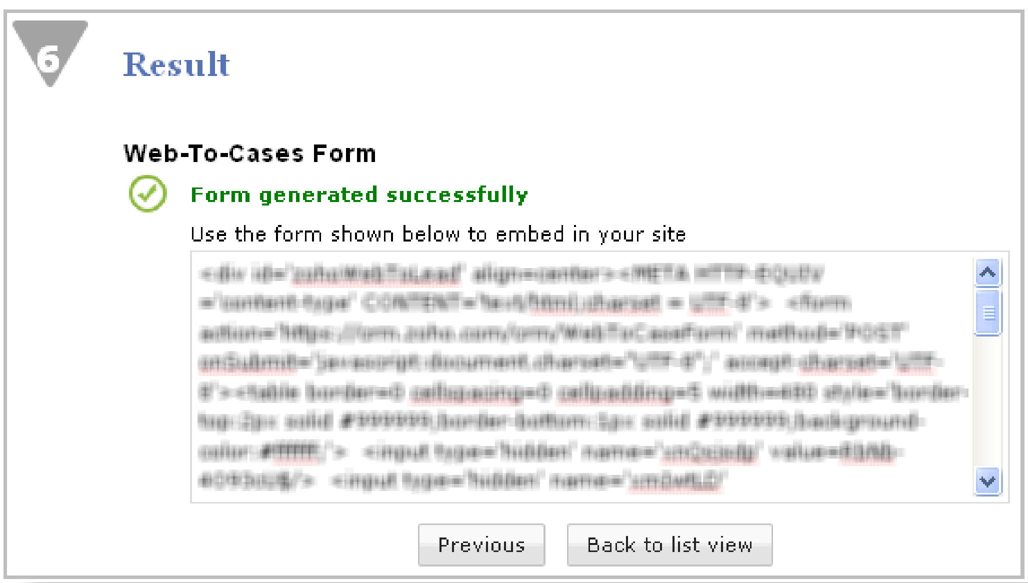


Figure 21: Generate Web Form

1. Click **Save & Next**.

2. It generates the HTML code for the web form.

Note:

- In order to avoid spam, the generated Web Form (HTML file) must be published in an active web server (Apache, Microsoft, IIS, etc.).
- The web form will not work if you submit the form values from your desktop.

Inserting Captcha

Captcha can be used in your web forms to prevent SPAM. You can add captcha by inserting the following in the HTML code that is generated for the web form.

Use this code before closing the div tag

```
<script>

function randomgen()

{

var rannumber='';

for(ranNum=1; ranNum<=6; ranNum++){

rannumber+=Math.floor(Math.random()*10).toString();

}

document.getElementById('varifyNum').innerHTML=rannumber;

document.getElementById('varifyNumHidden').value=rannumber;

}

randomgen();

//Varification number genarate code End here

//Validation Start Here

function validateForm()

{

var thefrm=document.contactForm;

if(thefrm.enterVerify.value=="")
```

```
{
 alert("Enter your Verification Code");
thefrm.enterVerify.focus();
eturn false;
}
else if(thefrm.enterVerify.value!="")
if(thefrm.enterVerify.value!=thefrm.varifyNumHidden.value)
{
alert("please Enter Currect Verification Number");
randomgen();
thefrm.enterVerify.select();
thefrm.enterVerify.focus();
return false;
}
else
{
return true;
}
}
else
{
return true;
}
}
</script>
```

Use this code

```
<tr>

  <td style="font-family: sans-serif; font-size: 12px;" class="feature-border"
align="right" nowrap="nowrap" width="29%">Verification Code:</td>

  <td class="feature-border" align="left" valign="middle" width="66%"><input
name="varifyNumHidden" id="varifyNumHidden" value="701469" type="hidden">

  <input name="enterVerify" id="enterVerify" type="text"> <div id="varifyNum"
style="font-size: 14px; font-family: Arial,Helvetica,sans-serif; font-weight:
bold;"></div></td>

</tr>
```

Before the Save and Reset button code:-

```
<tr><td colspan=2 align=center style='background-color:#eaeaea'> <input type='submit'
name='save' value=Save />     <input type='reset' name='reset' value=Reset
/> </td></tr>
```

3. Replace the code,

```
<form action='https://crm.zoho.com/crm/WebToContact' method='POST'
onSubmit='javascript:document.charset="UTF-8";' accept-charset='UTF-8'>
```

With

```
<form action='http://crm.zoho.com/crm/WebToContact' name="contactForm"
method='POST' onSubmit='return validateForm()'>
```

Auto Response Rules

The Auto Response rule feature enables you to send automated emails when leads, contacts, or cases are generated through web forms. When a lead is generated through web forms, you may want to send appropriate emails to the leads with different types of requests. In such cases, you can create an auto response rule with specific rule criteria. When a condition is satisfied, the corresponding email is sent. You can create many auto response rules but only one auto response rule can be active at a time.

Availability

Editions	Enterprise	Professional	Free
	YES	YES	NO

Create Auto Response Rule

To create autoresponse rules for web forms

1. Click **Setup** > **[Module] Settings** > **Auto Response Rules for Web to [Module]**
2. In the *Auto Response Rules for* Web to [Module] page, click **Create Rule**.

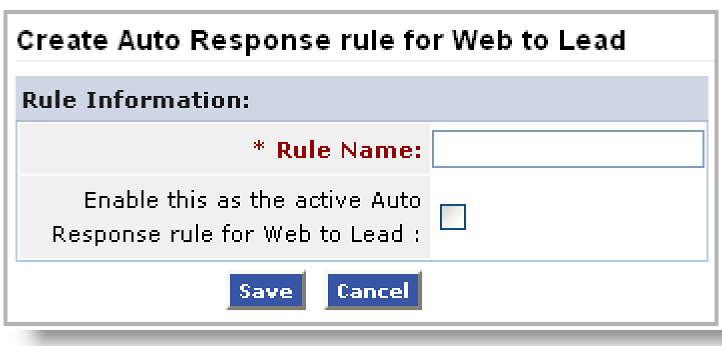


Figure 22: Create Auto Response Rules

3. In the *Create Auto Response Rules for Web to [Module]* page, do the following:

    a. Enter the **Rule Name**.

    b. Select the checkbox to activate the rule.

4. Click **Save**.

Note:

- When the details gathered through the web form does not satisfy the Rule criteria, then the email template selected while creating the web form will be sent.

Create Auto Response Rule Entry

To create autoresponse rule entry

1. Click **Setup** > **[Module] Settings** > **Auto Response Rules for Web to [Module]**
2. In the *Auto Response Rules for Web to [Module]* page, click on the rule for which you want to create the rule entry.

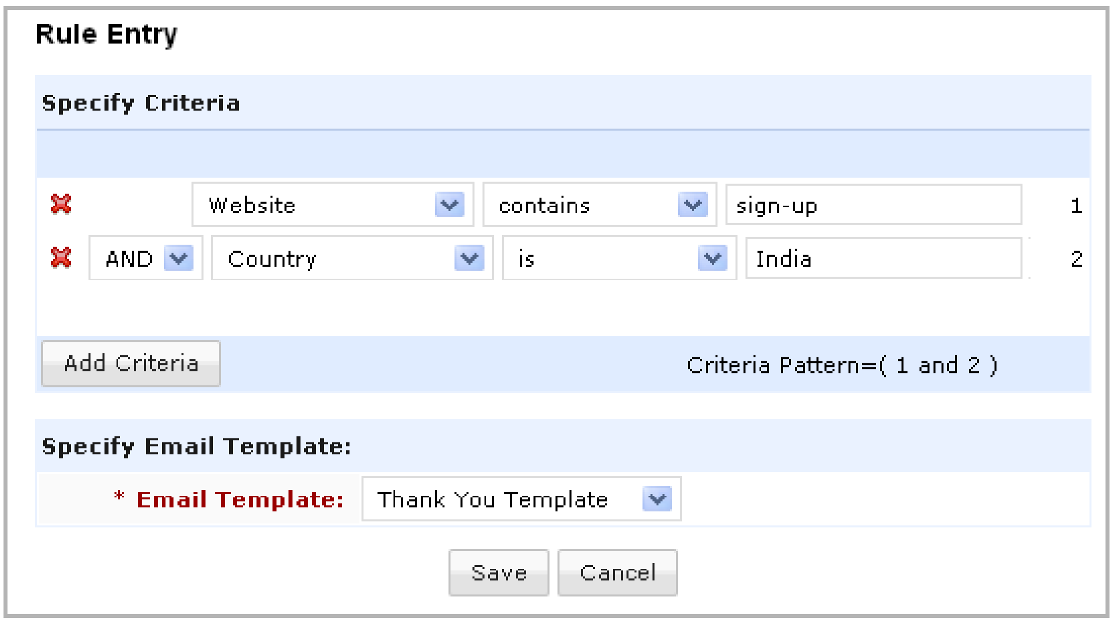


Figure 23: Rule Entry

3. In the *Auto Response Rules for Web to [Module]* page, click **Create Rule Entry**.
4. In the *Rule Entry* page, do the following:
    a. Specify the **Rule Criteria**.
    b. Choose an **Email Template** from the drop down list.
5. Click **Save**.

CHAPTER 10

EMAIL MARKETING

In This Section:

- Send Mass Emails
- Schedule Mass Emails
- Autoresponders

CHAPTER 10

EMAIL MARKETING

Communication with customers is an important activity in any business scenario. One of the best ways of communicating is through emails. Zoho CRM provides the option of using emails to reach a large number of customers and send mass emails. You can also create auto responders, schedule mass emails, and create email templates that are ready to use.

Note: The Mass Email feature is available only for the Leads and Contacts Module.

In Zoho CRM, you can send bulk emails to customers with respect to your business requirements. For example, you can send newsletters, special offers, updates, or personalized follow-up email to the customers in bulk. While sending bulk emails to customers, you can choose a predefined template for the message from various Email templates. Bulk emails ca be sent in the following ways:

- Sending Mass emails manually
- Scheduling Mass Emails

Note:

- Before sending emails, ensure that the record contains a valid email address.
- Emails will not be delivered to the records with invalid email address.

Benefits

- Save time in sending emails to the entire list of customers.
- Create new mailing list based on business requirements.
- Schedule emails to send later according to your convenience.
- Allow customers to subscribe/unsubscribe from the mailing list using Email opt-out.

Send Mass Emails

In Zoho CRM, you can send mass emails to customers manually, by creating a new mailing list or by using the existing list. You can select the recipients list in two ways:

- Instant Filter (creating New Custom View)
- Existing Custom View

Note:

- The Mass Email feature is available only in the Leads and Contacts modules.

- You need to create e-mail templates before sending mass e-mails.
- You can send a maximum of 250 mass emails per day, per company.
- The 250 emails per day, per company includes the Autoresponders, active email Schedulers, and Mass emails.
- There is no limit to the number of emails that you send individually.

Availability

Editions	**Enterprise**	**Professional**	**Free**
	YES	**YES**	**NO**
Permission Required	**Mass Email Leads/Contacts**		

To send mass emails

1. Click the **Leads** or **Contacts** tab.
2. In *Home* page, under *Leads/Contacts Tools*, click **Mass E-mail Leads/Contacts**.
3. In the *Mass E-mail* page, by default, the system displays the **E-mail Template** tab.

    - Select Email Templates
        - Click the **Email Template** tab
        - Under *Email Templates* section, select the Template from the list. Note, that you cannot edit the e-mail content here.
        - Click the **New Template** link to create a template.

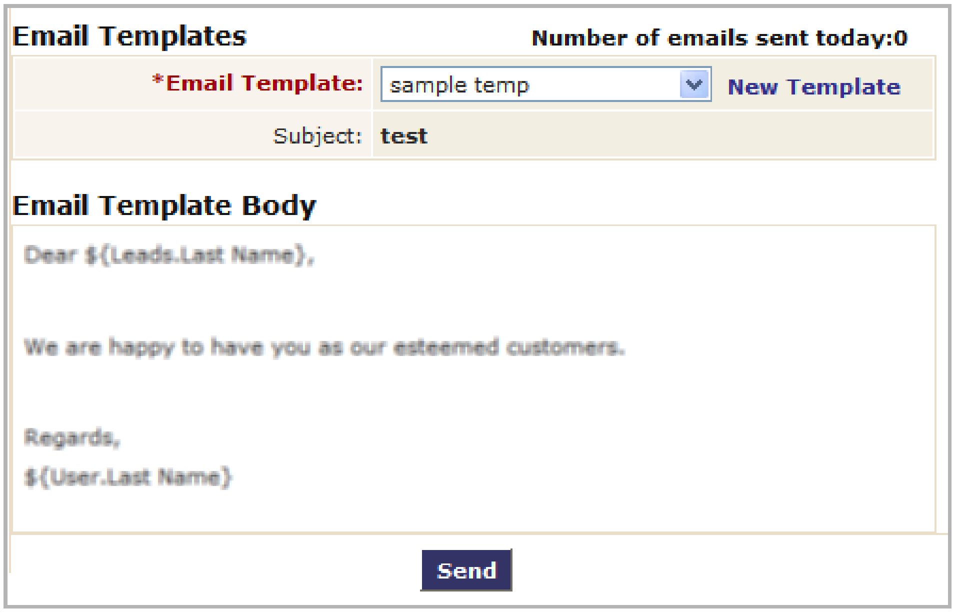


Figure 24: Email Template

- Select **Records**.
  - Click the **Select Records** tab
  - Click **Custom View Criteria**, and then **Select Custom View** from the list, or
  - Click **Manual Criteria**, to search and select the required records manually.

4. Click **Send**.

Schedule Mass Email

This feature enables you to schedule bulk e-mails to be sent to the selected leads or contacts. For example, you want to send the emails to customers at 10 AM PST, but you have an important meeting at that time. In that case, you can schedule the emails to be sent at 10 am PST by using the Mass Email Scheduler, i.e. the emails are sent to the customers at the scheduled time even in your absence.

Note:

- You can send 250 emails per day (12 AM to 11.59 PM PDT is considered as one day), per company.
- The 250 emails per day, per company includes the Autoresponders, active email Schedulers, and Mass emails.
- There is no limit to the number of emails that you send individually.

- For a given scheduled time only three bulk e-mail processes are possible.

To schedule mass emails

1. Click the **Leads** or **Contacts** tab.
2. In the *Home* page, under *Leads/Contacts Tools*, click **Schedule Mass Email**.
3. Click **New Mass Mail Schedule**.

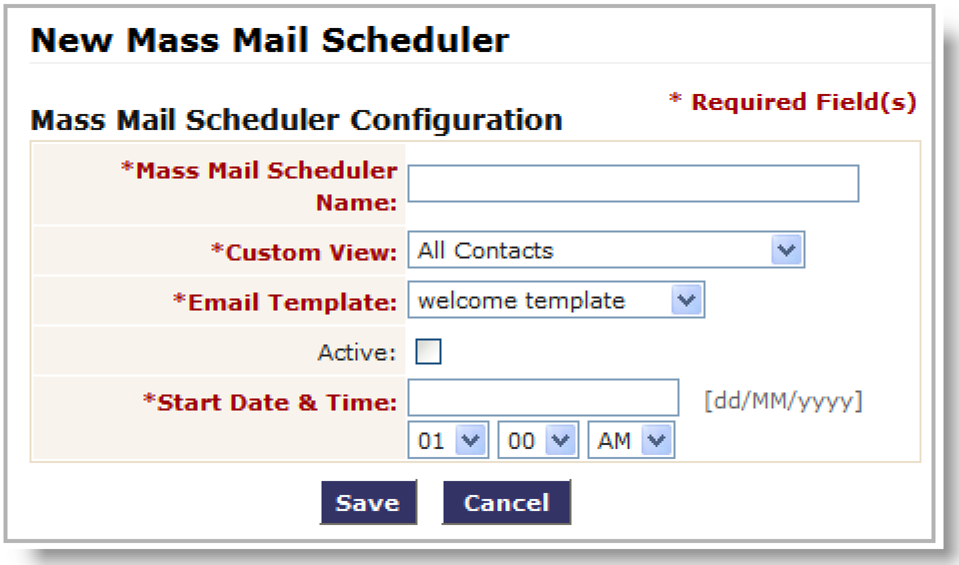


Figure 25: Mail Scheduler

4. In the *New Mass Mail Scheduler* page, do the following:

   a. Enter the **Mass Mail Scheduler Name**.

   b. Select the **Custom View** from the list.

   c. Select the **Email Template** from the list.

   d. Select the **Active** check box.

      Only when you select the **Active** check box, the scheduled mails will be delivered.

   e. Enter the **Start Date** and **Time** to schedule the mails.

      Enter the date in **MM/DD/YYYY** format, or select the date from the calendar displayed. Select the hours and minutes from the respective lists.

5. Click **Save**.

   The system displays the View Mass Mail Schedule page.

6. Click **Edit** or **Delete**, as required.

7. Click **Go Back**. The created Scheduler is displayed under Mass Mail Schedulers.

Note: The e-mail templates will be available in the list only if you had already created them.

Autoresponders

Building business relationships is a marketing priority, and when it comes to lead nurture programs, proper follow-up with prospects is essential to win deals. Autoresponder is a marketing automation functionality that can streamline the process of sending series of personalized email messages at predefined intervals to the leads and contacts. Additionally, you can exclude the responded leads or contacts from the next follow-up Emails.

You can use autoresponders in many ways. Some of the real-time business scenarios are listed below:

- Nurture leads
- Provide email tutorial courses regarding your product
- Send introduction Emails to the customers
- Automate reminder emails to receive payments from customers
- Schedule Newsletters

Availability

Editions	Enterprise	Professional	Free
	YES	NO	NO

Steps to Schedule Autoresponders

- Set up Web forms (Optional)
- Set up Custom Views with your contacts
- Set up Email Templates
- Set up Autoresponders

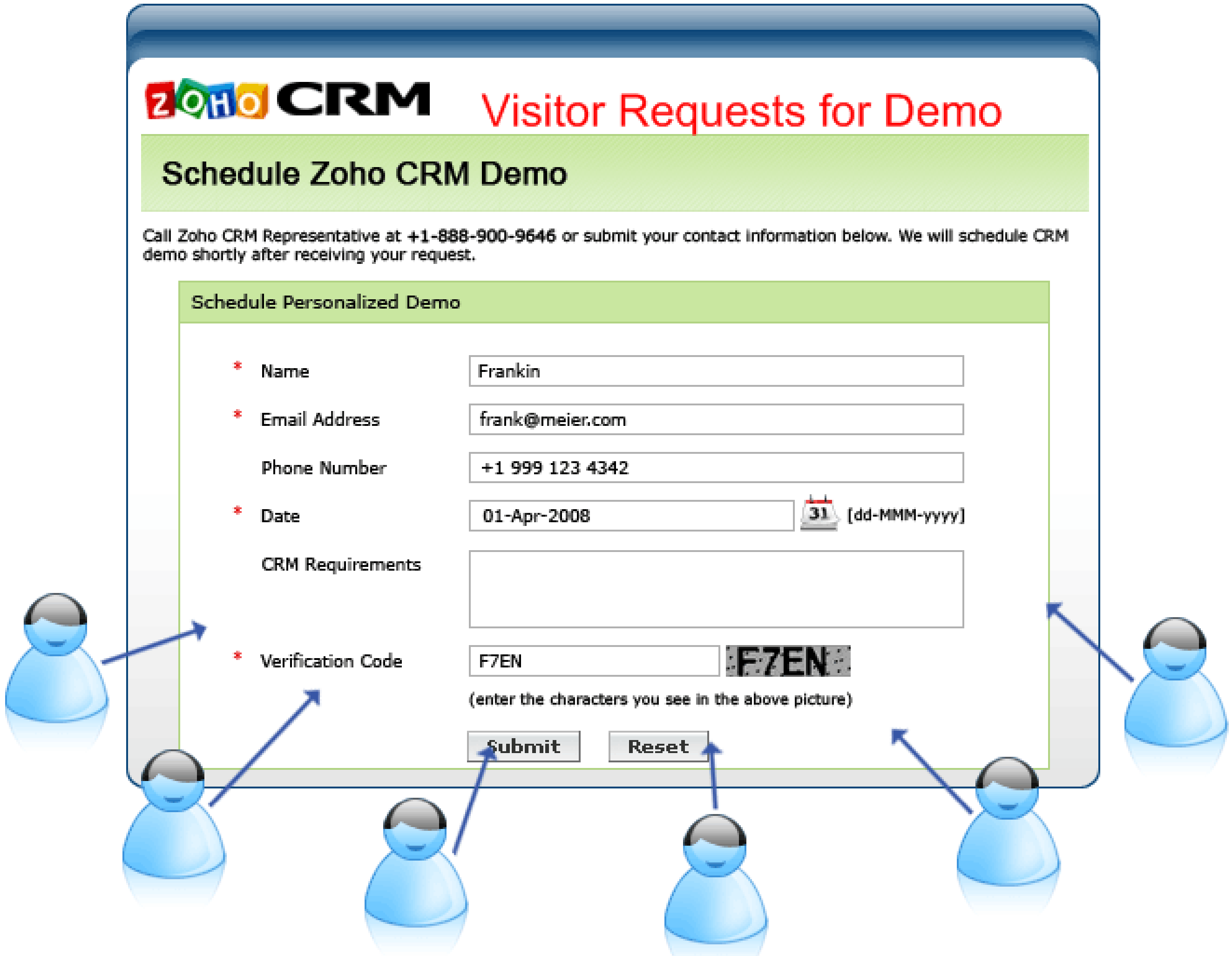


Figure 26: Visitor submits a Web Form

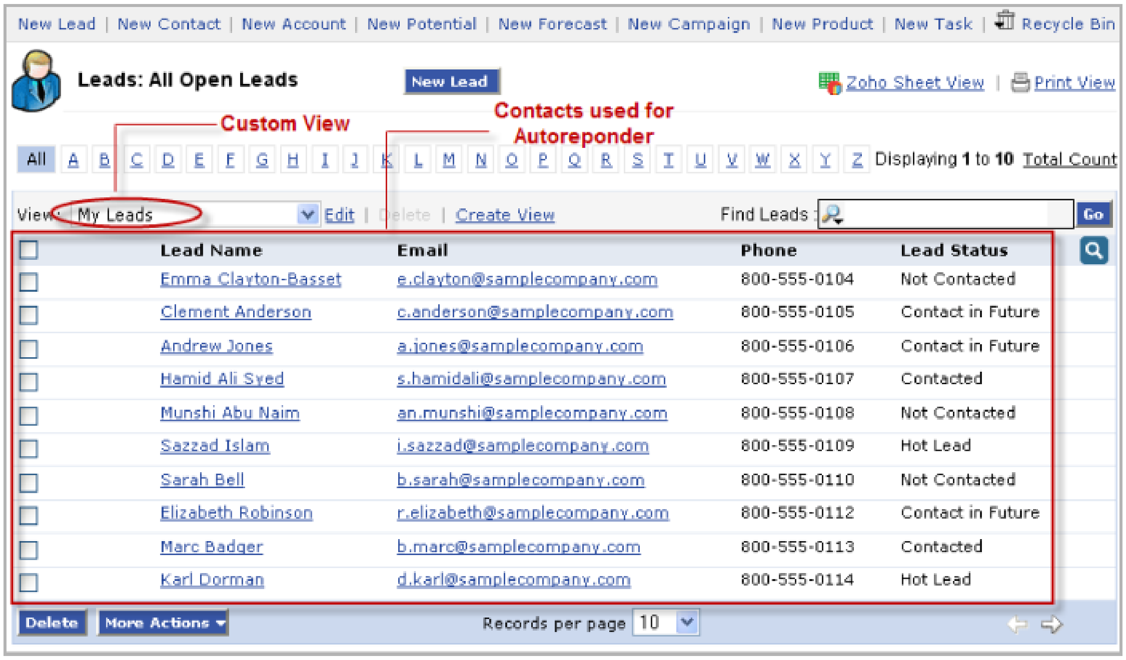


Figure 27: Visitors' information is stored in Zoho CRM - Manage Custom View for filtering Leads/Contacts

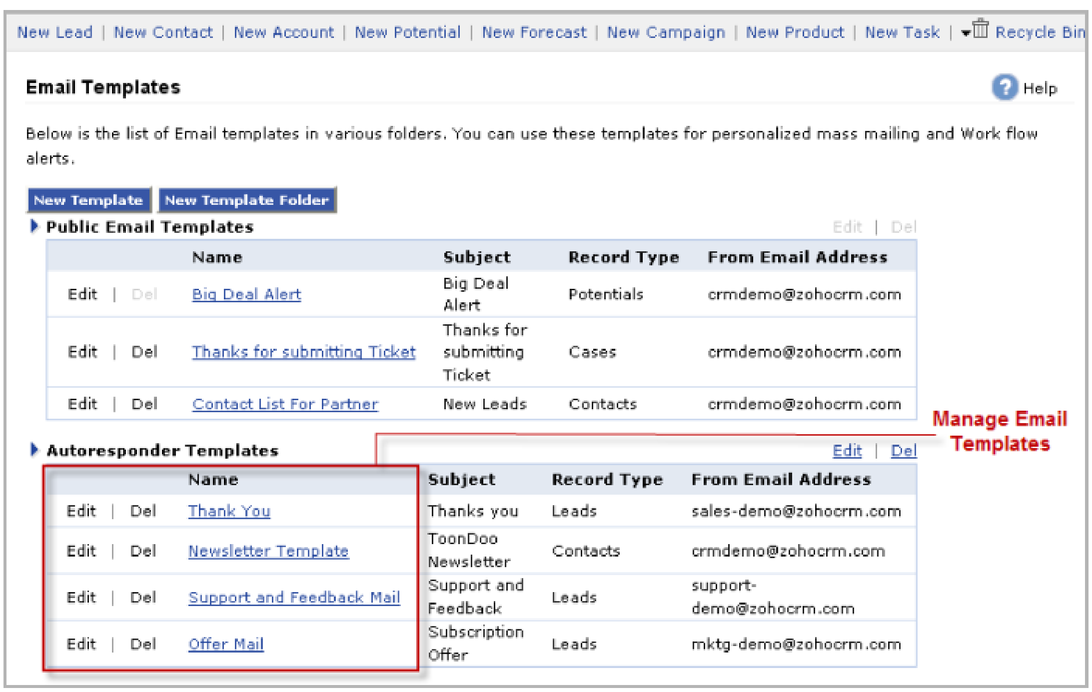


Figure 28: Set up Email Templates for sending emails to Leads/Contacts

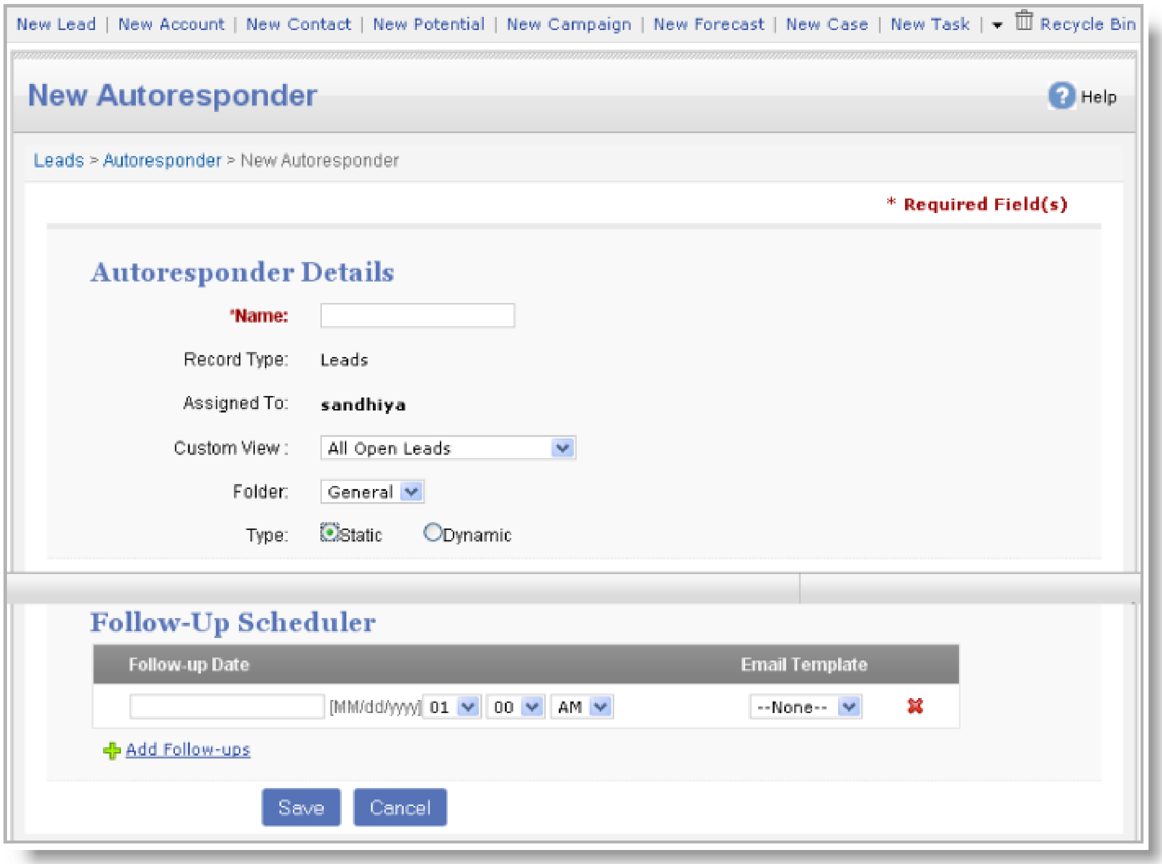


Figure 29: Schedule Autoresponders for the selected Leads/Contacts

Set up Autoresponder

Autoresponders are the solution to send automated replies and follow-up emails to the prospects and customers. Once you receive a response from the lead or contact, you have to manually exclude the contacts form the mailing list.

Important Notes:

- Module refers to the different tabs. For example, Leads, Contacts, Accounts etc.
- Custom view selected for the autoresponder must contain new data. If you select a custom view in which data is not new, autoresponder will send the first email to the same old data during subsequent iterations. For example, you can select custom views "Today's Leads" and "New This Week Contacts" instead of "All Open Leads" and "Recently Created Leads". In the Today's Leads view, data is always updated with the today's data whereas the data in All Open Leads view may not change frequently.
- While setting up Dynamic type Autoresponders, always select the Custom Views according to the options in the Recurrence Pattern section. If you set the recurrence pattern as **By Day**, make sure your data in the selected custom view is new every day. Similarly if you select **By Week**, your data must be a new one for that week before the

autoresponder is initiated. If the data used is old, autoresponder will send the first email to the same data during subsequent iterations.

- While executing the autoresponder, system cannot identify the duplicate records. Hence, you are recommended to check for the duplicate contacts and merge with the primary record, before setting up the autoresponde
- At present, you cannot track the response when customer responds to your email. Hence, you have to manually select the contacts from the mailing list to exclude them from the next follow-up.
- Use the unsubscription form in the autoresponder email templates. By using unsubscription form, you can allow the recipients to opt out from your next follow-up and avoid Anti-SPAM complaints.
- After setting up autoresponders, better not to change the Custom View, duration of the next follow-up and the follow-up template options.

To set up autoresponders

1. Click the *[Module]* **tab**.
2. In the *[Module] Home* page, under *[Module] Tools*, click the **Autoresponders** link.
3. In the *Autoresponders* page, click **Create Autoresponder**.

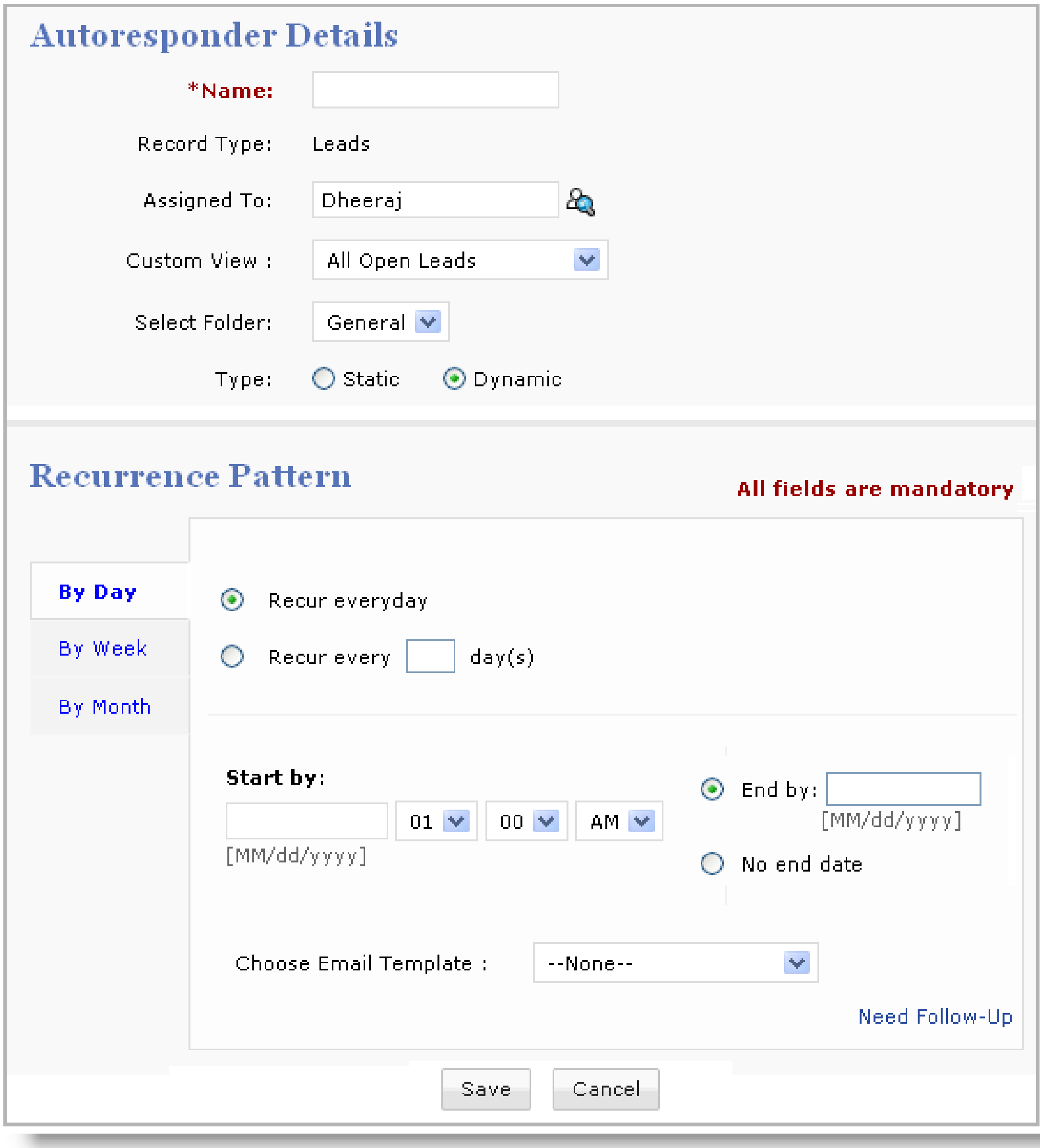


Figure 30: Autoresponders

4. In the *New Autoresponder* page, under the *Autoresponder Details* section, do the following:

    a. Enter the **Name** of the autoresponder.

    b. Select the owner of the records from the **Assigned To** pick list.

       By default, the field displays the name of the user who creates the autoreponder.

    c. Select the **Custom View** to set up the recipient list for the autoresponder.

d. Select a **Folder** for the autoresponder.

e. Select **Static** or **Dynamic** and specify the corresponding details. (Refer the table for the list of standard fields)

- **Static** - Autoresponder in which the Follow-up happens on a fixed date.
- **Dynamic** - Autoresponder in which the Follow-up happens on predefined intervals set by you.

5. Click **Save**

Note:

- You will be able to change the name of the user in the **Assigned To** field, only if you have the permission to change the owner of the records.
- The autoresponder email will be sent only to the records that belong to the user specified in the **Assign To** field.
- The autoreponder email will not be sent to the records for which the **Email Opt Out** is enabled.
- Only when you clear the **Email Opt Out** checkbox in the *Record's Details* page, the autoresponder emails will be sent to those records.

The following table gives the list of fields and their description when **Static** option is selected.

Fields	Description
Follow-up Date	Specify the follow-up date. The follow-up date is calculated with respect to the day when the autoresponder is initiated.
Email template	Choose the template from the drop-down list.

The following table gives the list of fields and their description when **Dynamic** option is selected.

***By Day* - Fields**	Description
Recur every ___ day(s)	Enter how often in days the autoresponder should be

	repeated.
Recur everyday	Select this if the autoresponder should be repeated everyday. Select the Start date (MM/dd/yyyy format) and time for the autoresponder.
End by	Select the End date for the autoresponder in MM/dd/yyyy format.
No end date	Select this if the autoresponder should continue repeating till you specify an end date.
Choose Email Template	Choose the template from the drop-down list.
Add Follow-up	Click the link to add follow-ups for the autoresponder. **Example**: The autoresponder is initiated on 01-01-2010 and the follow-up dates specified are *After 3 days* and *After 10 days*. In such a case, the first follow-up email will be sent on 04-01-2010 and the second follow-up email will be sent on 11-01-2010.
***By Week* - Fields**	**Description**
Recur every ____week(s) on S-M-T-W-T-F-S	Enter how often in weeks the autoresponder should be repeated. Then, select the checkbox(es) that correspond to the day(s) of the week on which the recurrence should occur.
Start by	Select the Start date (MM/dd/yyyy format) and time for the autoresponder.
End by	Select the End date for the autoresponder in MM/dd/yyyy format.
No end date	Select this if the autoresponder should continue repeating till you specify an end date.
Choose Email Template	Choose an email template for the autoresponder from the drop-down list.
Add Follow-up	Click the link to add follow-ups for the autoresponder. **Example**: The autoresponder is initiated on 01-01-2010 and the follow-up dates specified are *After 3 days* and *After 10 days*. In such a case, the first follow-up email will be sent on 04-01-2010 and the second follow-up email will be sent on 11-01-2010.

By Month - Fields	Description
Day __ of every ___ month(s)	Enter how often in months and on the specified date the autoresponder should be repeated.
____ ____ of every month	Select a particular day when the autoresponder should be repeated every month.
Start by	Select the Start date (MM/dd/yyyy format) and time for the autoresponder.
End by	Select the End date for the autoresponder in MM/dd/yyyy format.
Choose Email Template	Choose an email template for the autoresponder from the drop-down list.
Add Follow-up	Click the link to add follow-ups for the autoresponder. **Example**: The autoresponder is initiated on 01-01-2010 and the follow-up dates specified are *After 3 days* and *After 10 days*. In such a case, the first follow-up email will be sent on 04-01-2010 and the second follow-up email will be sent on 11-01-2010.

Note:

- Auto-responders feature is available only in the **Leads** and **Contacts** modules
- You can send maximum 250 mass emails per day, per company.
- You can set a maximum of 3 autoresponders and a maximum of 5 follow-ups per autoresponder.

Create Folders

In Zoho CRM, you can create various folders for a better organization of your autoresponders. This helps you to keep them classified under different categories for quick access

To create folders

1. Click the *[Module]* **tab**.
2. In the *[Module] Home* page, under *[Module] Tools*, click the **Autoresponders** link.
3. In the *Autoresponders* page, click **Create Folder.**

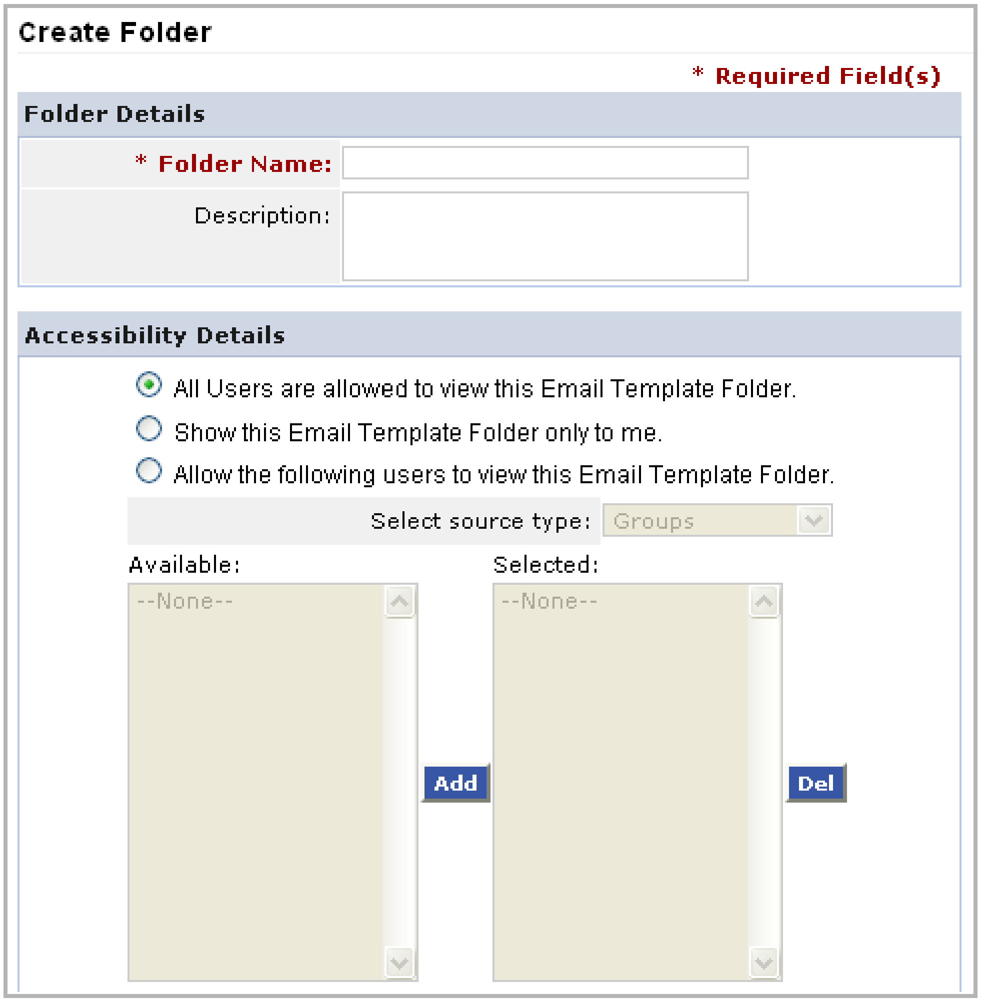


Figure 31: Create Folder

4. In the *Create Folder* page, do the following:

    a. Enter the **Folder Name**.

    b. Enter the **Description**.

    c. Under *Accessibility Details*, select the option to specify the accessibility to the autoresponder feature.

5. Click **Save**.

Excluding Contacts from Follow-up

After receiving replies from the recipients, you can exclude the leads or contacts from the follow-up, and schedule the next follow-up only to the leads/contacts that have not responded.

To exclude records from the next follow-up

1. Click the *[Module]* **tab**.
2. In the *[Module] Home* page, under *[Module] Tools*, click the **Autoresponders** link.
3. In the *Autoresponders* page, click the **Update Response** link corresponding to the autoresponder.

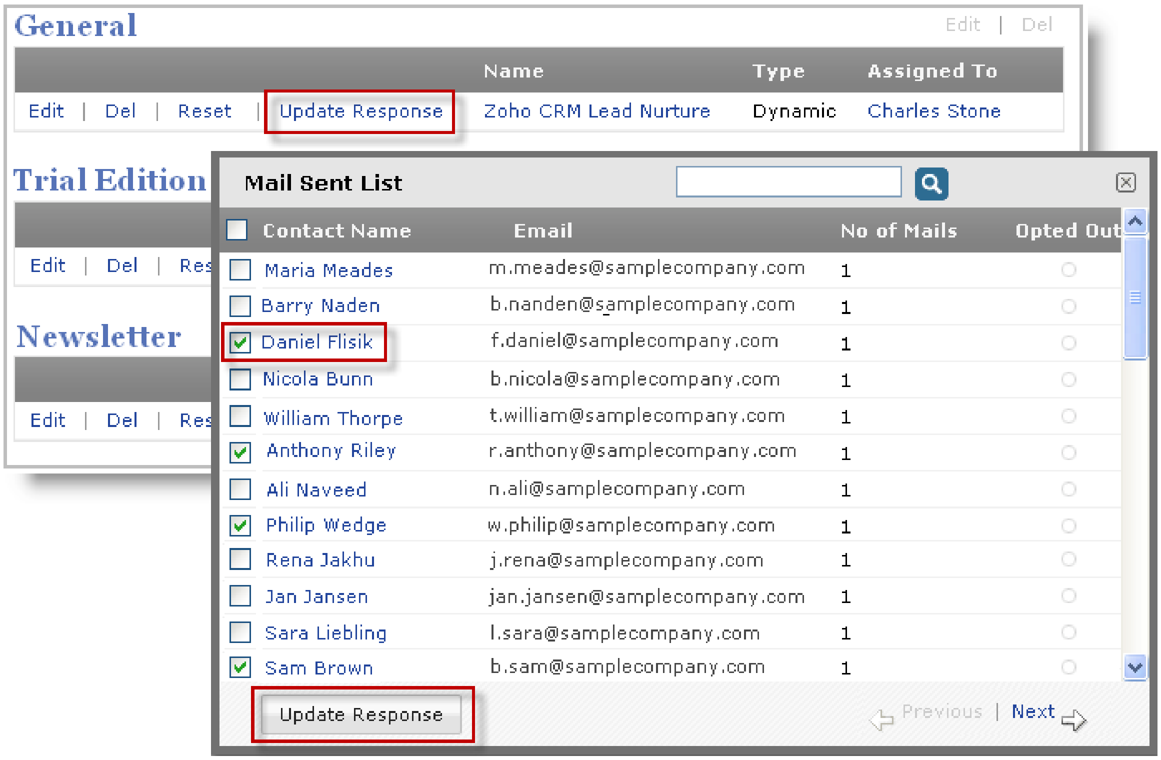


Figure 32: Update Response

4. In the *Mail Sent List* overlay, select the leads/contacts to be excluded from the next follow-up.
5. Click **Update Response**.

To exclude records before the autoresponder is initiated

The Mailing List will be available only after the autoresponder is initiated. In case you want to exclude some contacts from the mailing list, even before the autoresponder is initiated, follow the steps given below:

1. Click the **Leads** or **Contacts** tab.
2. In the *[Module] Home* page, select the checkbox(es) corresponding to the records that you want to exclude.

3. Click **More Options**, and then click the **Update Response** link.

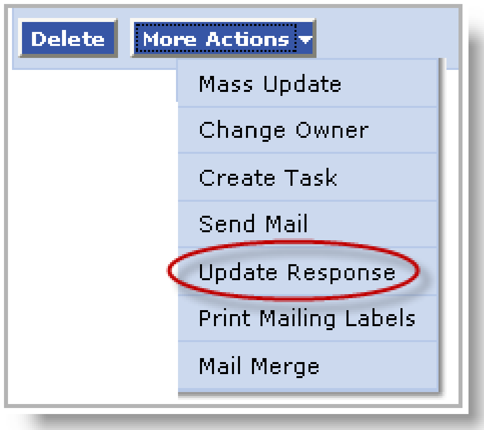


Figure 33: Update Response

4. In the *Select Autoresponder* popup window, select the autoresponder from the drop-down list.
5. Click **Save**.

Including all Contacts in the Follow-up

This option enables you to include all the contacts for the follow-up that you had excluded from the mailing list.

To include all the record for the next follow-up

1. Click the *[Module]* **tab**.
2. In the *[Module] Home* page, under *[Module] Tools*, click the **Autoresponders** link.
3. In the *Autoresponders* page, click the **Reset** link corresponding to the autoresponder.

Autoresponder Scenario

Here is a real-time scenario, just one of the many ways in which you can use autoresponders.

The Challenge

A user has shown interest in your product and has subscribed for a 30 day free trial of your product. Your challenge here is to engage the prospect in your product and follow-up with right email messages to win the deal. This is a real-time Drip Marketing situation where autoresponders can be used.

The Scenario

- A visitor to your web site fills the web form and signs up for a 30 day trial period of your product.
- An auto-generated Thank you / Welcome email is sent to the user.
- User's (lead) details are listed in Zoho CRM under a custom view (eg: Today's Leads).
- Autoresponder is initiated.
  - Day 1 - 'Getting Started' email is sent to the user.
  - Day 2 - 'Support and Feedback Information' email is sent.
  - Day 5 - 'Product Updates' email is sent.
  - Day 15 - 'Purchase Offer' email is sent.
  - Day 25 - 'Reminder' email is sent.

Note: If the user subscribes to the product and is excluded from the mailing list, then the follow-up emails that come after will not be sent.

The procedure to set up autoresponder

1. Click the **Leads** tab.
2. In the *Leads Home* page, under *Lead Tools*, click the **Autoresponders** link.
3. In the *Autoresponders* page, click **Create Autoresponder**.
4. In the *New Autoresponder* page, under the *Autoresponder Details* section, do the following:
   a. Enter the **Name** of the autoresponder.
   b. Select the **Custom View** to set up the recipient list for the autoresponder.
   c. Select a **Folder** for the auto-responder.
   d. Select **Dynamic** and specify the corresponding details (Refer the table.)
5. Click **Save**.

Note: If the user subscribes to the product, during the follow-up process, the user's email address should be excluded from the mailing list. On excluding the email address, the successive follow-up emails will not be sent to the user

The following table provides information on the options that you need to specify for the autoresponder.

Field Names	Description
Recurrence Pattern	
By Day	Select this option to specify the recurrence pattern by day.
Recur everyday	The autoresponder will be initiated everyday
Start Date	Specify the start date of the autoresponder
End Date	Specify the end date of the autoresponder
Choose Email Template	Choose the email template that should be sent on the first day when the autoresponder is initiated. (Getting started email template)
Follow-up Details	
1. After 2 days	This email will be sent 2 days after the first autoresponder email Select Support and Feedback Information email template.
2. After 5 days	The email will be sent 5 days from the day the autoresponder is triggered. Select the Product Updates email template.
3. After 15 days	The email will be sent 15 days from the day the autoresponder is triggered. Select the Purchase Offer email template.
4. After 25 days	The email will be sent 25 days from the day the autoresponder is triggered. Select the Reminder email template.

PART III

INVENTORY MANAGEMENT

In This Section:

- Inventory Management in ZCRM
- Product Management
- Price Book Management
- Vendors Management
- Quotes Management
- Sales Order Management
- Purchase Order Management
- Invoice Management

CHAPTER 11

INTRODUCTION

In This Section:

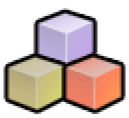
- Introduction to Inventory Management

CHAPTER 11

INTRODUCTION

Zoho CRM extends beyond the traditional CRM functions and enables complete sales cycle management features by integrating Inventory Management features, such as Products, Price Books, Vendors, Sales Quotes, Orders, and Invoices with the Sales related modules, such as Leads, Accounts & Contacts, and Opportunities.

With the Zoho CRM - Inventory Management features you can achieve the seamless integration between pre-sales and post-sales accounting activities in a single application. In addition, you can also procure goods/services from the selected list of vendor.

	**Product Management** Products refer to the goods or services sold or procured by any organization. **Create Products | Associate Products | Customize Tax Rates**
	**Price Book Management** Price Books refer to the agreed price for selling a product to a customer. Based on the agreed terms, the prices can even vary for different customers. **Create Price Books | Associate Price Books | Set Discount**
	**Vendor Management** Vendors are the companies, individuals or contractors from whom your organization procures products and/or services. **Create Vendors | Associate Vendors**
	**Quotes Management** Quotes are legal agreement between a customer and a vendor to deliver the requested product within the specified time at the agreed price. **Create Quotes | Associate Quotes | Convert Quote**

	**Sales Order Management** Sales Orders are confirmation of sales, generated after the customer sends a purchase order based on your quotes. **Create Sales Orders | Associate Sales Orders**
	**Purchase Order Management** Purchase Orders are legally bound order-placing document for procuring products or services from vendors. **Create Purchase Orders | Associate Purchase Orders**
	**Invoice Management** Invoices are bills issued by the vendor to the customers along with the goods/services with the purpose of procuring payments. **Create Invoices | Associate Invoices**

Chapter 12

Product Management

In This Section:

- Create Products
- Associate to Other Records

CHAPTER 12

PRODUCT MANAGEMENT

Products can be either goods or services, which are sold or procured by your organization. In Zoho CRM, you can manage your company- wide products that are sold to the customers as well as procured from the vendors. Hence, both sales and purchasing departments can use the Products module effectively according to their department process. In case your organization procures products from vendors and sell to customers with a markup, both sales and purchase departments can coordinate in a better way.

Sales department can use the products module along with other modules, such as leads, accounts, potentials, quotes, Sales Orders, and Invoices where as purchasing department can use along with Vendors and Purchase Orders. In general Product details page contains the product name, manufacturer/reseller name, part numbers, sales start/end dates, support start/end dates, price, stock position and others.

Availability

Editions	**Enterprise**	**Professional**	**Free**
	YES	**YES**	**NO**
Permission Required	**Products Tab**		

In Zoho CRM, you can store product details by entering data in product detail form.

Create Products Individually

You can create individual products by:

- Filling details in the product creation form.
- Using Quick Create option; a quick create component present in the left pane of the Products Home page.
- Duplicating the products with few changes in the existing product details.

List of Standard Product-related Fields

Field Name	Description	Data Type
Product Name*	Specify the name of the product. This field is mandatory.	Text box, alphanumeric (50)
Product Code	Specify the product identification.	Text box, alphanumeric (40)
Product Active	Specify the status of the product.	Check box
Commission Rate	Specify the commission rate for selling the product.	Text box, decimal ()
Qty/Unit	Specify the quantity rate for selling the product.	Decimal
Unit Price	Specify the unit price of the product.	Decimal
Manufacturer	Select the name of the product manufacturer.	Pick list
Product Category	Select the category of the product.	Pick list
Purchase Date	Select the date of purchase from the calendar.	Date
Support Start Date	Select the date on which the product support starts.	Date
Support Expiry Date	Select the date on which the product support ends.	Date
Description	Specify any other details about product.	Text area

To create products individually

1. In the **Products** module, click **New Product**.
2. In the *Create Product* page, enter the product information.
3. Under *Product Information*, select the **Product Active** check box if you want the newly created product to be active.
4. By default, the check box is selected.
5. Click **Save**.

Note: Only the active products are displayed in the list of products

To create products instantly

1. Click the **Products** tab.
2. On the left pane of the Home page, select **Products** from the **Quick Create** list.
3. Enter the relevant details.
4. Click **Save**.

To create duplicate products

1. In the **Products** tab, click a particular product that you want to be duplicated.
2. In the *Product Details* page, click **Clone**.
3. In the *Clone Product* page, modify the required details.
4. Click **Save**.

Associate Product with Other Records

You can create a 360-degrees view of the product to display all the associated details, such as products, trouble tickets, open activities, history of the completed activities, attachments, and notes.

To attach documents

This feature enables you to attach documents, spreadsheets and presentations to the products. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

To create leads

1. In the *Product Details* page, the existing lead details, if any, are displayed.
    - Click **Name**, **Company**, **Email**, **Lead Source**, or **Status** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the leads respectively.
2. Click **New**.
3. Enter the lead details.
4. Click **Save**.

To create contacts

1. In the *Product Details* page, the existing contact details, if any, are displayed.
    - Click **Contact Name**, **Email**, **Phone**, **Mobile**, or **Fax** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the contacts respectively.
2. Click **New**.
3. Enter the contact details.
4. Click **Save**.

To create potentials

1. In the *Product Details* page, the existing potential details, if any, are displayed.
    - Click **Potential Name**, **Amount**, **Stage**, **Probability (%)**, **Closing Date**, or **Type** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the potentials respectively.
2. Click **New**.
3. Enter the potential details.
4. Click **Save**.

To create accounts

1. In the *Product Details* page, the existing account details, if any, are displayed.
    - Click **Account Name**, **Phone**, **Website**, **Account Type**, **Industry**, or **Annual Revenue** links to sort the display order of the records.

- Click the relevant **Edit** or **Del** link to modify or delete the accounts respectively.

2. Click **New**.
3. Enter the account details.
4. Click **Save**.

To create tasks or events

1. In the *Product Details* page, the existing task or event details, if any, are displayed.
    - Click **Subject**, **Activity Type**, **Status**, **Due Date** or **Owner Name** links to sort the display order of the records.
    - Click the relevant **Edit**, **Del**, or **Close** link to modify, delete, or close the task respectively.
2. Click **New Task/New Event/Log a Call** and specify the relevant details.

To create cases

1. In the *Product Details* page, the existing case details, if any, are displayed.
2. Click **Subject**, **Case Reason**, **Email**, **Status**, **Priority**, or case **Type** links to sort the display order of the records.
3. Click the relevant **Edit** or Del link to modify or delete the cases respectively.
4. Click **New**.
5. Enter the case details.
6. Click **Save**.

To create solutions

1. In the *Product Details* page, the existing solution details, if any, are displayed.
    - Click **Solution Title**, **Solution Number**, **Published**, **Status**, or **Number** of comments links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the solutions respectively.
2. Click **New**.
3. Enter the solution details.
4. Click **Save**.

To add price books

1. In the *Potential Details* page, the existing note details, if any, are displayed.
    - Click **Title**, **Note Content**, **Modified Time**, **Created Time**, or **Owner Name** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the notes respectively.
2. Click **New Note** and do the following:
    a. Enter the **Title**. It is mandatory.
    b. The system displays the **Owner Name**. Click  to change the owner's name.
    c. Enter the **Note Content** in the text box.
3. Click **Save**.

Customize Tax Rates

This feature enables you to manage taxes and the corresponding tax rates.

To customize tax rates

1. Click the **Setup** > **Products Settings** > **Customize Tax Rates**.

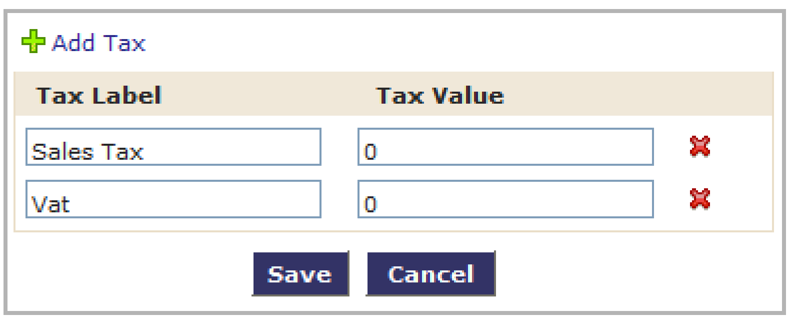


Figure 34: Add Tax

2. In the *Customize Tax Rates* page, by default the Tax Labels, namely Sales Tax and VAT are displayed.
3. Enter the **Tax Value** for each Tax Label.
4. Click the **Add Tax** link to add more tax rates.
5. Click **Save**.

CHAPTER 13

PRICE BOOK MANAGEMENT

In This Section:

- Create Price Books
- Associate to Other Records

CHAPTER 13

PRICE BOOK MANAGEMENT

Price Books are used for selling products at different prices, based on the agreement terms with a particular type of customer. For each customer you can sell the same product at different prices.

There are two key prices in price books. One is Unit Price and the other is List Price.

Unit Price - It is a price fixed by the manufacturer for the product and which cannot be changed.

List Price - It is the sellers' price. The manufacturer/resellers may sell the product with different prices to their resellers/customers. These variable prices for the same product are called as List Prices.

Availability

<table>
<tr><th rowspan="2">Editions</th><th>Enterprise</th><th>Professional</th><th>Free</th></tr>
<tr><td>YES</td><td>YES</td><td>NO</td></tr>
<tr><th>Permission Required</th><td colspan="3">Price Books Tab</td></tr>
</table>

Note: While creating a potential you can select products only from a single price book.

Create Price Books

In Zoho CRM, you can store price book details by entering data in the Price Book form or importing the data from external sources.

List of Standard Fields

In the Price Book Edit form, you need to specify the Price Book-related information. The following table provides descriptions of the various fields in the form.

Field Name	Description	Data Type
Price book Owner	Select the price book owner from the available users list	Lookup

Field Name	Description	Data Type
Price book Owner	Select the price book owner from the available users list	Lookup
Price book Name*	Specify the name of the price book. This field is mandatory.	Text box, alphanumeric (50)
Pricing Model	Select type of pricing model as per your requirement. You can select None, Flat or Differential type discounts.	Pick list
Active	Select the check box to set the status of the price book as active.	Check box
Description	Specify any other details about Price Book.	Text box

Create Price Books Individually

You can create price books individually by:

- Filling details in the price book creation form.
- Using Quick Create option; a quick create component present in the left pane of the Price Books Home page.
- Duplicating the price book with few changes in the existing price book details.

To create price books individually

1. In the Price Books module, click New Price Book.
2. In the Create Price Book page, enter the price information.
3. Click Save.

Note:

- By default, the person who creates the price book owns it.
- To change owner, click the **Change** link in the Price Book Owner field and select another user.

To create price books instantly

1. Click the **Price Books** tab.
2. On the left pane of the *Home* page, select **Price Books** from the **Quick Create** list.
3. Enter the relevant details.
4. Click **Save**.

To create duplicate price books

1. In the **Price Books** module, click a particular record that you want to be duplicate.
2. In the *Price Books Details* page, click **Clone**.
3. In the *Clone Price Books* page, modify the required details.
4. Click **Save**.

Set up Volume Discounts

While creating price book information, you have an option to choose your Pricing Model based on your business requirement. You can choose from the following options:

- No discount
- Flat Discount
- Differential Discount

To define the pricing model with no discount

1. In the ***Price Books*** module, click **New Price Book**.
2. In the *Create Price Book* page, enter a **Price Book Name**.
3. Select **Pricing Model** from the drop down list.

   By default, the Pricing Model displayed is **None**.
4. Click **Save**.

To define the pricing model with Flat/Differential discount

1. In the *Price Books* module, click **New Price Book**.
2. In the *Create Price Book* page, enter a **Price Book Name**.

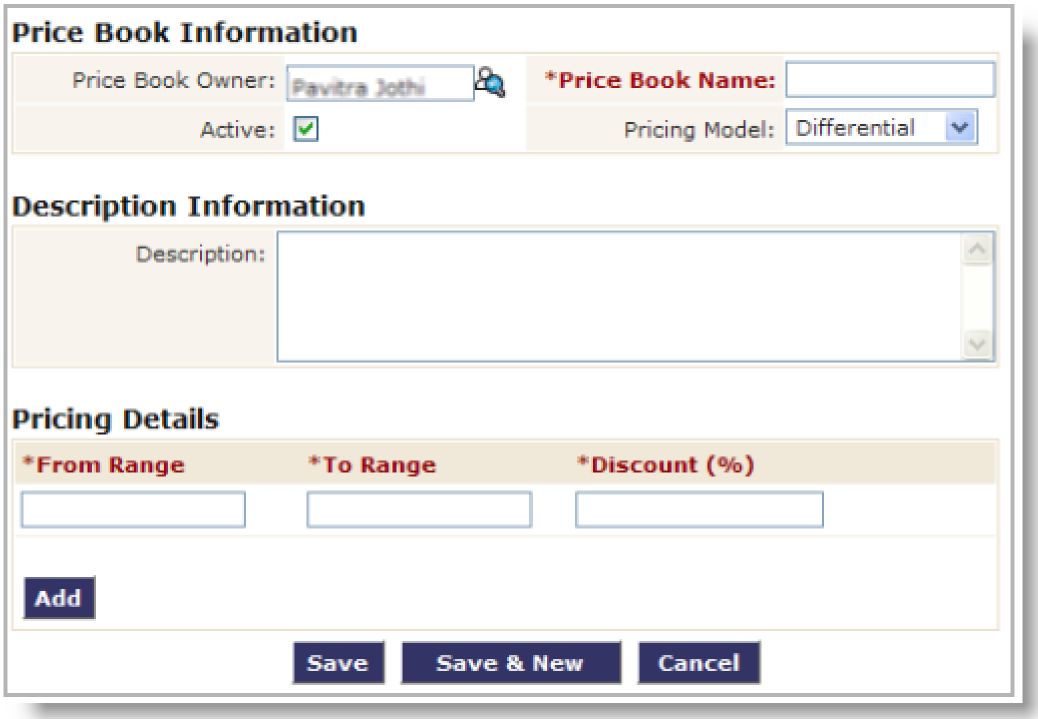


Figure 35: Flat/Differential Discount

3. Select **Flat/Differential** discount from the drop down list
4. In the *Pricing Details* section, enter the **From Range**, **To Range** and **Discount (%)**.
5. Click **Add** to enter more slots of pricing details and discounts.
6. Click **Save**.

The chart below shows a comparative study of the Flat & Differential discounts:

DISCOUNT MODELS

PRODUCT : ZOHO APPS   UNIT PRICE : $10   UNITS :225

UNITS RANGE FROM	UNITS RANGE TO	DISCOUNT OFFERED (%)
1	100	0
101	200	10
201	300	15
301	400	20
401	500	25

Flat Discount Model				Differential Discount Model			
UNITS	RANGE	DISCOUNT	AMOUNT	UNITS	RANGE	DISCOUNT	AMOUNT
225	201 - 300	15%	1912.50	100	1 - 100	0%	1000
				100	101 - 200	10%	900
				25	201 - 225	15%	212.50
225	Total		1912.50	225	Total		2112.50

Associate Price Book with Other Records

You can create a 360-degrees view of the product to display all the associated details, such as products, trouble tickets, open activities, history of the completed activities, attachments, and notes.

To attach documents

This feature enables you to attach documents, spreadsheets and presentations to the price book. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

To add products

1. In the *Price Book Details* page, the existing product details, if any, are displayed.

    - Click **Product Name**, **Product Code**, **Product Active**, **Manufacturer**, **Support Start Date**, or **Support Expiry Date** links to sort the display order of the records.
    - Click the relevant **Del** link to delete the record.

2. Click **Add Product**.
3. Select the check box(es) corresponding to the product.
   Note, that the products will be available in the list only if you add them using the Products module.
4. Click **Add to Price Book**.

CHAPTER 14

VENDOR MANAGEMENT

In This Section:

- Create Vendors
- Associate to Other Records

CHAPTER 14

VENDOR MANAGEMENT

Vendors include companies, people, and contractors from which your company gets products and services. They can be either direct manufacturers or resellers. In the Zoho CRM system typical vendor selection process involves the following steps:

- Evaluate your business needs and create requirements document (RFI/RFP).
- Collect information about vendors from Trade Magazines, Yellow Pages, Advertisements, referrals, and other channels.
- Send RFI (request for information) to vendors and scrutinize the primary list of vendors based on their response to your RFI.
- Send RFP (request for proposals) to selected list of vendors.
- Evaluate vendors based on the response to your RFP, conduct vendor interviews and short-list the vendors.
- Gather required information, such as product details, communication channel, product delivery process and others from the short listed vendors.
- In Zoho CRM - Vendors module, create vendor information, such as business address of the vendor, contact information of the persons you are dealing with, products supplied /to be supplied, purchase orders for the shipments, activities related to vendors and others. In addition, you can also attach the important documents related to each vendor.
- Periodically update the vendors' details and products purchased so that you can have a better visibility on your vendors/suppliers for the future procurement.

Availability

Editions	**Enterprise**	**Professional**	**Free**
	YES	**YES**	**NO**
Permission Required	**Vendors Tab**		

Create Vendors

In Zoho CRM, you can store vendor details by entering data in vendor details form.

In the Vendor Edit form, you need to specify the vendor details. The following table provides descriptions of the various fields in the form.

List of Standard Vendor-related Fields

Field Name	Description	Data Type
Vendor Name*	Specify the name of the vendor. This field is mandatory	Text box, alphanumeric (50)
Phone	Specify the phone number of the vendor	Text box, alphanumeric (40)
E-mail	Specify the E-mail ID of the vendor	Check box
Website	Specify the Web site URL of the vendor	Text box, decimal ()
GL Account	Select the general ledger account	Pick List
Category	Specify the category of the vendor	Text box, alphanumeric (40)
Vendor Address Street City State Postal Code Country	Specify the address of the vendor	
Description	Specify any other details about vendor	Text area (long text)

Create Vendors Individually

- You can create vendors individually by:
- Filling details in the vendor creation form.
- Using Quick Create option; a quick create component present in the left pane of the Vendors Home page.
- Duplicating the vendor with few changes in the existing vendor details

To create vendors individually

1. In the **Vendors** module, click **New Vendor**.

2. In the *Create Vendor* page, enter the vendor details.
3. Click **Save**.

To create vendors instantly

1. Click the **Vendors** tab.
2. On the left pane of the *Home* page, select **Vendors** from the **Quick Create** list.
3. Enter the relevant details.
4. Click **Save**.

To create duplicate records of vendors

1. In the **Vendors** tab, click a particular vendor that you want to be duplicated.
2. In the *Vendor Details* page, click **Clone**.
3. In the **Clone Vendor** page, modify the required details.
4. Click **Save**.

Associate Vendor with Other Records

You can create a 360-degrees view of the vendor to display all the associated details, such as products, activities, contacts, and purchase orders.

- **Products**: To add products that are purchased from vendor
- **Purchase Orders**: To create purchase orders for getting products from the vendors
- **Open Activities**: To add new tasks and events.
- **Closed Activities**: To track closed tasks and events.
- **Attachments**: To add files to the vendor record.
- **Contacts**: To add contacts related to vendors.

To attach documents

This feature enables you to attach documents, spreadsheets and presentations to the vendor. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

To add products

1. In the *Vendor Details* page, the existing product details, if any, are displayed.

    - Click **Product Name**, **Product Code**, **Product Active**, **Manufacturer**, **Support Start Date**, or **Support Expiry Date** links to sort the display order of the records.
    - Click the relevant **Del** link to delete the record.

2. Click **New**.
3. In the *Create Products* page, specify the product details.
4. Click **Save**.

To create tasks or events

1. In the *Vendor Details* page, the existing task or event details, if any, are displayed.

    - Click **Subject**, **Activity Type**, **Status**, **Due Date** or **Owner Name** links to sort the display order of the records.
    - Click the relevant **Edit**, **Del**, or **Close** link to modify, delete, or close the task respectively.

2. Click **New Task/New Event/Log a Call** and specify the relevant details.

Note: Once the activity is over, you can close the activity using the Close link.

To create purchase orders

1. In the *Vendor Details* page, the existing purchase order details, if any, are displayed.

    - Click **Subject**, **Status**, **Tracking Number**, **Due Date**, **Excise Date**, or **Sales Commission** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the purchase orders respectively.

2. Click **New**.
3. In the *Create Purchase Orders* page, specify the purchase order details.
4. Click **Save**.

To create contacts

1. In the *Vendor Details* page, the existing contact details, if any, are displayed.

    - Click **Contact Name**, **Email**, **Phone**, **Mobile**, or **Fax** links to sort the display order of the records.

- Click the relevant **Edit** or **Del** link to modify or delete the contacts respectively.

2. Click **New**.
3. In the *Create Contacts* page, specify the contact details.
4. Click **Save**.

Chapter 15

Quote Management

In This Section:

- Create Quotes
- Associate to Other Records

CHAPTER 15

QUOTE MANAGEMENT

Sales Quotes are legally binding agreement between customer and vendor to deliver customer requested products in a specified time-frame at a predefined price. Your customers can place orders within the stipulated period (validity date) that has been specified in the quote otherwise you may cancel the quote or send a new quote extending the time-frame. In general, Sales Quote contains the Quote number, date, line items (products) including the quantities and prices based on your Price Books, Terms & Conditions and others. In Zoho CRM you can create a quote directly from the potential or from the account page.

Availability

<table>
<tr><th rowspan="2">Editions</th><th>Enterprise</th><th>Professional</th><th>Free</th></tr>
<tr><th>YES</th><th>YES</th><th>NO</th></tr>
<tr><th>Permission Required</th><th colspan="3">Quotes Tab</th></tr>
</table>

Create Quotes

In Zoho CRM, you can store quote details by entering data in quote details form.

In the Quote Edit form, you need to specify the quote details. The following table provides descriptions of the various fields in the form.

List of Standard Quote-related Fields

Field Name	Description	Data Type
Quote Owner	Select the name of the user to whom the quote is assigned.	Lookup
Subject*	Specify the name of the quote. This field is mandatory.	Text box, alphanumeric (50)
Potential Name	Specify the potential name for which the quote has to be created.	Text box, alphanumeric (40)
Quote Stage	Specify the status of the quote.	Check box
Valid Till	Specify the date till the quote is valid after sending to the prospective customer.	Date

Field Name	Description	Data Type
Quote Owner	Select the name of the user to whom the quote is assigned.	Lookup
Contact Name	Specify the contact to which the quote has to be created.	Lookup
Team	Specify the team name	Text box
Carrier	Select the name of the carrier manufacturer.	Pick list
Account Name*	Specify the account name to which the quote has to be created.	Lookup
Billing Address*	Specify the billing address of the account or contact to which the quote has to be sent. If you have selected the account or contact, the corresponding billing address is automatically filled up.	Text box, alphanumeric (256)
Shipping Address*	Specify the shipping address of the account or contact to which the shipment has to be sent. If you have already selected the account or contact, the corresponding shipping address is automatically filled up.	Text box, alphanumeric (256)
Product Details	Specify the line items of the quote.	
Product	Select the product name.	Lookup
Product Description	Enter a description for the product Note for existing Users: This enhancement will come into effect, only if you initially save the *Edit Page Layout* for Quotes. • Click **Setup** > **Quote Settings** > **Edit Page Layout**, and then click **Save**.	Text
Quantity	Specify the number of units.	Numeric (Integer)
Unit Price	Displays the unit price of the product.	Alphanumeric
List Price	Select the product list price from Price Book or specify the product price.	Numeric
Total	Displays the amount of the selected products.	Alphanumeric
Terms & Conditions	Specify the terms and conditions that are associated with quote.	Text area (32,000)
Description	Specify any other details about quote.	Text area (32,000)

To create quotes

1. In the **Quotes** module, click **New Quote**.
2. In the *Create Quotes* page, enter the quotes details.
3. Click **Save**.

To create duplicate quotes

1. In the **Quotes** tab, click a particular quote that you want to be duplicated.
2. In the *Quote Details* page, click **Clone**.
3. In the *Clone Quotes* page, modify the required details.
4. Click **Save**.

Associate Quotes with Other Records

You can create a 360-degrees view of the quote to display all the associated details, such as sales orders, open activities, and history of the completed activities.

- **Sales Orders**: To display sales orders associated with quotes.
- **Open Activities**: To add tasks and events related to quotes.
- **Closed Activities**: To display the completed activities.
- **Attachments**: To attach documents.
- **Emails**: To view e-mail messages.

To attach documents

This feature enables you to attach documents, spreadsheets and presentations to the quotes. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

To create tasks or events

1. In the *Quote Details* page, the existing task or event details, if any, are displayed.
    - Click **Subject**, **Activity Type**, **Status**, **Due Date** or **Owner Name** links to sort the display order of the records.
    - Click the relevant **Edit**, **Del**, or **Close** link to modify, delete, or close the task respectively.

2. Click **New Task/New Event/Log a Call** and specify the relevant details.

Note: Once the activity is over, you can close the activity using the **Close** link.

To create sales orders

1. In the *Quote Details* page, the existing sales order details, if any, are displayed.
2. **Click Subject, Status, Customer No.**, **Due Date**, **Excise Date**, or **Sales Commission** links to sort the display order of the records.
3. Click the relevant **Edit** or **Del** link to modify or delete the sales orders respectively.
4. Click **New**.
5. Enter the sales order details.
6. Click **Save**.

Convert Quote to Sales Order/Invoice

To convert quotes to sales order/Invoice

1. Click the **Quotes** tab.
2. In the *Quotes Home* page, select the required quote.
3. In the *Quote Details* page, click **Convert**, and then select **Sales Order/Invoice**.

   The Sales Order/Invoice Details page will be displayed.

CHAPTER 16

SALES ORDER MANAGEMENT

In This Section:

- Create Sales Orders
- Associate to Other Records

CHAPTER 16

SALES ORDER MANAGEMENT

Sales Order is a confirmation document sent to the customers before delivering the goods/services. Sales Order (SO) can be created once the quote is accepted by your prospective customer (potential) and the Purchase Order (PO) is sent by the customer for further processing. After receiving the PO, some of the customers may request SOs to know the exact date of delivery of the goods/services. Also the inventory/production department looks at the list of Sales Orders to see what needs to be shipped out and when. After the order is shipped and delivered to the customer an invoice is generated from the sales order for billing purposes. In general SO contains the SO number, date, line items (products) including the quantities and prices based on PO, Billing address, Shipping address, Terms & Conditions and others.

Availability

Editions	**Enterprise**	**Professional**	**Free**
	YES	**YES**	**NO**
Permission Required	**Sales Order Tab**		

Create Sales Orders

In Zoho CRM, you can store sales order details by entering data in sales order details form.

In the Sales Order Edit form, you need to specify the sales order-related information. The following table provides description of the various fields in the form.

List of Standard Sales Order-related Fields

Field Name	Description	Data Type
Subject*	Specify the name of the sales order. This field is mandatory.	Text box, alphanumeric (50)
Potential Name	Select the potential for which the sales order has to be generated.	Select option
Customer No	Specify the customer identification number (if any)	Text box, alphanumeric (50)
Purchase Order	Select the reference purchase order.	Text box
Quote Name	Select the reference quote.	Select option

Field Name	Description	Data Type
Contact Name	Select the contact for which the sales order has to be generated.	Select option
Due Date	Select the date	Date
Carrier	Select the carrier's name that ships the products from your warehouse to customer site.	Pick list
Pending		Text box, alphanumeric (50)
Status	Specify the status of the sales order.	Check box
Sales Commission	Specify the commission to the sales person upon closing the deal.	Numeric (float)
Excise Duty	Specify the excise duty for the shipment	Text box, numeric
Account Name*	Specify the account name to which the sales order has to be created.	Select option
Assigned To	Select the Zoho CRM user name to whom the sales order handling duty is assigned.	Select option
Billing Address *	Specify the billing address of the account or contact to which the sales order has to be sent. If you have selected the account or contact the billing address is automatically filled up.	Text box, alphanumeric (256)
Shipping Address *	Specify the shipping address of the account or contact to which the shipment has to be sent. If you have already selected the account or contact the shipping address is automatically filled up.	Text box, alphanumeric (256)
Product Details	Specify the line items of the sales order.	
Product *	Select the product name.	Select option

Field Name	Description	Data Type
Product Description	Enter a description for the product Note For Existing Users: This enhancement will come into effect, only if you initially save the *Edit Page Layout* for Sales Orders. • Click **Setup** > **Sales Order Settings** > **Edit Page Layout**, and then click **Save**.	Text
Quantity in Stock	Displays the stock quantity..	Numeric (Integer)
Quantity*	Specify the quantity for which the sales order has to be generated	Numeric (Integer)
Unit Price	Displays the unit price of the product.	Currency
List Price*	Select the product list price from Price Book or specify the product price.	Lookup and Numeric (Integer)
Tax	Specify the tax component of the products	Currency
Adjustments	Specify if there are any adjustments, such as discounts, or extra charges etc.	Currency
Total	Displays the amount of the selected line item.	Currency
Terms & Conditions	Specify the terms and conditions that are associated with sales order.	Text area (long text)
Description	Specify any other details about sales order.	Text area (long text

To create sales orders

1. In the **Sales Orders** module, click **New Sales Order**.
2. In the *Create Sale Orders* page, enter the details.
3. Click **Save**.

To create duplicate sales order

1. In the **Sales Orders** tab, click a particular sales order that you want to be duplicated.
2. In the *Sale Order Details* page, click **Clone**.
3. In the *Clone Sale Orders* page, modify the required details.
4. Click **Save**.

Associate Sales Order with Other Records

You can associate the sales order with other records such as, activities, attachments and notes.

To attach documents

This feature enables you to attach documents, spreadsheets and presentations to the sales orders. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

To create tasks or events

1. In the *Sales Order Details* page, the existing task or event details, if any, are displayed.
    - Click **Subject**, **Activity Type**, **Status**, **Due Date** or **Owner Name** links to sort the display order of the records.
    - Click the relevant **Edit**, **Del**, or **Close** links to modify, delete, or close the task respectively.
2. Click **New Task/New Event/Log a Call** and specify the relevant details

Note: Once the activity is over, you can close the activity using the **Close** link.

To create invoices

1. In the *Sales Order Details* page, the existing invoice details, if any, are displayed.
    - Click **Subject**, **Status**, **Invoice Date**, **Due Date**, **Excise Duty**, or **Sales Commission** links to sort the display order of the records.
    - Click the relevant **Edit** or Del link to modify or delete the invoices respectively.
2. Click **New**.

3. Enter the invoice details.
4. Click **Save**.

Chapter 17

Purchase Order Management

In This Section:

- Create Purchase Orders
- Associate to Other Records

CHAPTER 17

PURCHASE ORDER MANAGEMENT

Purchase Order is an order placed for procuring products or services from your short listed vendors. It is a legal binding document that protects interests of both vendor and buyers, which can be used as legal binding document for both parties. In general, PO contains the PO number, date, line items (products) including the quantities and prices based on Sales Quote, Billing address, Shipping address, Terms & Conditions and others.

You can use the PO for communicating your product and pricing requirements to vendors so that there will not be any obligations in future. Also, you can use the PO to cross-check the products shipped to your shipping address and invoices sent to your billing address. In addition, your vendor can use PO as legal document in the event of nonpayment in a court of law for claiming damages from your side.

Availability

Editions	**Enterprise**	**Professional**	**Free**
	YES	**YES**	**NO**
Permission Required	**Purchase Order Tab**		

Create Purchase Orders

In the Zoho CRM system, you can store purchase order details by entering data into the Purchase Order form.

In the Purchase Order Edit form, you need to specify the purchase order-related information. The following table provides descriptions of the various fields in the form.

List of Standard Purchase Order-related Fields

Field Name	Description	Data Type
Subject*	Specify the name of the purchase order. This field is mandatory.	Text box, alphanumeric (50)
Sales Order	Select the reference Sales order.	Select option
Customer No	Specify the customer identification number (if any)	Text box, alphanumeric (50)

Field Name	Description	Data Type
Purchase Order Date	Specify the date on which purchase order is created.	Date
Due Date	Select the due date.	Date
Sales Commission	Specify the commission to the sales person upon closing the deal.	Numeric (float)
Account Name *	Specify the account name to which the purchase order has to be created.	Select option
Status	Specify the status of the purchase order.	Check box
Account Name *	Specify the account name to which the purchase order has to be created.	Select option
Assigned To*	Select the Zoho CRM user name to whom the purchase order handling duty is assigned.	Select option
Billing Address *	Specify the billing address of the account or contact to which the purchase order has to be sent. If you have selected the account or contact the billing address is automatically filled up.	Text box, alphanumeric (256)
Shipping Address *	Specify the shipping address of the account or contact to which the shipment has to be sent. If you have already selected the account or contact the shipping address is automatically filled up.	Text box, alphanumeric (256)
Product Details	Specify the line items of the purchase order.	
Product	Select the product name.	Select option
Product Description	Enter a description for the product Note for Existing Users: This enhancement will come into effect, only if you initially save the *Edit Page Layout* for Purchase Orders. • Click **Setup** > **Purchase Order Settings** > **Edit Page Layout**, and then click **Save**.	Text
Quantity	Specify the number of units.	Numeric (Integer)
Unit Price	Displays the unit price of the product.	
List Price	Select the product list price from Price Book or specify the product price	Lookup and Numeric (Integer)

Field Name	Description	Data Type
Total	Displays the amount of the selected products.	
Terms & Conditions	Specify the terms and conditions that are associated with purchase order.	Text area
Description	Specify any other details about purchase order.	Text area

To create purchase orders

1. In the **Purchase Orders** module, click **New Purchase Order**.
2. In the *Create Purchase Order* page, enter the related information.
3. Click **Save**.

Associate Purchase Order with Other Records

By default, you can associate the purchase order with other records such as, activities, attachments, and notes.

To attach documents

This feature enables you to attach documents, spreadsheets and presentations to the purchase order. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

To create tasks or events

1. In the *Purchase Order Details* page, the existing task or event details, if any, are displayed.
    - Click **Subject**, **Activity Type**, **Status**, **Due Date** or **Owner Name** links to sort the display order of the records.
    - Click the relevant **Edit**, **Del**, or **Close** link to modify, delete, or close the task respectively.
2. Click **New Task/New Event/Log a Call** and specify the relevant details

Note: Once the activity is over, you can close the activity using the **Close** link.

CHAPTER 18

INVOICE MANAGEMENT

In This Section:

- Create Invoices
- Associate to Other Records

CHAPTER 18

INVOICE MANAGEMENT

Once the sales stage reaches to final stage you may start working on payment procedure. In this regard Invoice plays a vital role, which is very important for both Sales and Accounting purposes. Invoice is a bill issued by the vendor to the customers along with the goods/services shipment. It usually contains reference number of Purchase Order, Date, Billing Address, Shipping Address, Terms of Payment, Line Items (products/services) with quantities and prices, and others. In a typical organization, invoicing completes the sales process and begins the accounting process where account receivable is managed by Accounts/Finance teams.

In Zoho CRM, you can create invoices directly from the Potentials, Accounts, Quotes, or Sales Order.

Availability

Editions	**Enterprise**	**Professional**	**Free**
	YES	**YES**	**NO**
Permission Required	**Invoice Tab**		

Create Invoices

In Zoho CRM, you can create invoices by entering data in the Invoice details form.

In the Invoice Edit form, you need to specify the invoice-related information. The following table provides descriptions of the various fields in the form.

List of Standard Invoice-related Fields

Field Name	Description	Data Type
Subject*	Specify the name of the invoice. This field is mandatory.	Text box, alphanumeric (50)
Sales Order	Select the reference Sales order (if any).	Lookup
Customer No	Specify the customer identification number (if any).	Text box, alphanumeric (50)

Field Name	Description	Data Type
Invoice Date	Specify the date on which the invoice is created.	Date
Due Date	Specify the invoice due date as per your payment terms.	Date
Sales Commission	Specify the commission to the sales person upon closing the deal.	Numeric (float)
Account Name *	Specify the account name to which the invoice has to be created.	Lookup
Status	Specify the status of the invoice.	Check box
Account Name *	Specify the account name to which the invoice has to be created.	Lookup
Assigned To*	Select the Zoho CRM user name to whom the invoice handling duty is assigned.	Lookup
Billing Address *	Specify the billing address of the account or contact to which the invoice has to be sent. If you have selected the account or contact the billing address is automatically filled up.	Text box, alphanumeric (256)
Shipping Address *	Specify the shipping address of the account or contact to which the shipment has to be sent. If you have already selected the account or contact the shipping address is automatically filled up.	Text box, alphanumeric (256)
Product Details	Specify the line items of the invoice.	
Product*	Select the product name.	Lookup
Product Description	Enter a description for the product Note For Existing Users: This enhancement will come into effect, only if you initially save the *Edit Page Layout* for Invoices. Click Setup > Invoice Settings > Edit Page Layout, and then click Save.	Text

Field Name	Description	Data Type
Quantity	Specify the number of units.	Numeric (Integer)
Unit Price	Displays the unit price of the product.	Currency
List Price*	Select the product list price from Price Book or specify the product price	Lookup and Numeric (Integer)
Total	Displays the amount of the selected products.	Currency
Terms & Conditions	Specify the terms and conditions that are associated with invoice.	Text area (32 KB)
Description	Specify any other details about invoice.	Text area (32 KB)

Create Invoice Individually

You can create invoices individually by:

- Filling details in the invoice creation form.
- Duplicating the invoices with few changes in the existing invoice details.

To create invoices individually

1. In the **Invoices** module, click **New Invoice**.
2. In the *Create Invoice* page, enter the invoice details.
3. Click **Save**.

To create duplicate invoices

1. In the **Invoices** tab, click a particular invoice that you want to be duplicated
2. In the *Invoice Details* page, click **Clone**.
3. In the *Clone Invoice* page, modify the required details.
4. Click **Save**.

Associate Invoices with Other Records

You can associate invoice with the other records such as, activities, attachments and notes.

To attach documents

This feature enables you to attach documents, spreadsheets and presentations to the invoices. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

To create tasks or events

1. In the *Invoice Details* page, the existing task or event details, if any, are displayed.
    - Click **Subject**, **Activity Type**, **Status**, **Due Date** or **Owner Name** links to sort the display order of the records.
    - Click the relevant **Edit**, **Del**, or **Close** link to modify, delete, or close the task respectively.
2. Click **New Task/New Event/Log a Call** and specify the relevant details

Note: Once the activity is over, you can close the activity using the **Close** link.

PART IV
CUSTOMER SUPPORT

In This Section:

- Customer Support in ZCRM

Chapter 19

Introduction

In This Section:

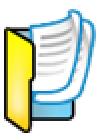
- Introduction to Customer Support

CHAPTER 19

INTRODUCTION

Zoho CRM provides the Customer Support & Service management (Help Desk) features, such as Cases (Trouble tickets), Solutions (Knowledge base), Case Routing & escalation through Workflow rules, and easy to deploy Web-to-Case forms for capturing customer-specific cases through Websites. In addition, you can also synchronize customer-specific e-mail messages as Cases from Microsoft Outlook mail client to Cases module in Zoho CRM.

Cases and Solutions functionality can be used to streamline organization-wide Customer Support process and enable a better integration between Sales & Customer Support processes in a single system. Integration between Sales and Post-sales support management helps organizations in resolving the customer reported cases in a least possible time, thereby enhance the customer satisfaction and more cross-selling and up-selling opportunities in future.

	**Case Management** Cases refer to the feedback received from the customers on various issues pertaining to the use of products or services. **Create Cases | Associate Cases | Approve Cases | Case Assignment Rules | Case Escalation Rules**
	**Solution Management** Solutions refer to the resources within the organization that enables solving repetitive problems encountered by customers. **Create Solutions | Associate Solutions**

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CHAPTER 20

CASE MANAGEMENT

In This Section:

- Create Cases
- Associate to Other Records
- Approve Cases
- Assignment Rules
- Escalation Rules

CHAPTER 20

CASE MANAGEMENT

In the world of Internet, online Customer Support has became an integral part of the organizations' business process. Customer Support is becoming an important activity in retaining all types of products and service industries. In general, case trouble tickets are used to capture the customer feedback on various types of problems that arise after purchasing product/service from your company. Sometimes customers may provide some good feature requests that may be useful during future product/service enhancements.

Availability

Editions	**Enterprise**	**Professional**	**Free**
	YES	**YES**	**YES**
Permission Required	**Cases Tab**		

Typical Case Management Process

1. Customize the fields in Case page according to your organization's Customer Support process (You may use the existing fields, disable some of the fields, or add new custom fields).
2. Setup case generation process by filling the Case form, importing case data from external sources, or capturing cases directly from Website using Web-to-Case form.
3. Assign cases to the correct users using the workflow rules.
4. Follow-up cases till resolutions are sent to the customers.
5. Once the resolution is working fine, add the solution to the publicly accessible Solutions module for future reference.

In Zoho CRM, cases can be generated through telephone, E-mail, or Website. In addition, you can also generate cases from customer specific e-mails in Microsoft Outlook using the Zoho CRM Outlook Edition.

Create Cases

In the Zoho CRM system, you can create cases by:

- Entering data manually into case details form
- Importing cases from external sources
- Capture cases from Website through Web-to-Case form
- Adding customer-specific e-mail message as case from Microsoft Outlook to Cases module

In the Case Edit form, you need to specify the case details. The following table provides descriptions of the various fields in the form.

List of Standard Case-related Fields

Field Name	Description	Data Type
Case Number	Displays the case ID after creating a case.	Numeric
Case Owner	Select the name of the Zoho CRM user to whom the Case is assigned.	Lookup
Subject*	Specify the title of the Case. This field is mandatory.	Text box, Alphanumeric (255)
Priority	Select the priority of the Case from the drop-down list.	Pick list
Status	Select the status of the Case from the drop-down list.	Pick list
Reported By	Displays the name of the contact.	-
Related To	Select the name of the contact who submitted the Case.	Lookup
Type	Select the type of problem. It can be a general question, feature request, or a real issue in your product/service.	Pick list
Case Origin	Select the source from which the case has been generated. You can select Email, Phone, or Website. If you select Email, you must specify the Email ID of the customer.	Pick list

Field Name	Description	Data Type
Email	Specify the Email ID of the contact.	Email
Phone	Specify the phone number of the customer	Textbox
Case Reason	Specify the reason for the case	Pick list
No of comments	Displays the number of comments submitted during case resolution.	-
Potential Name	Displays the potential name	
Description	Specify complete details about the case.	Text Area (32 KB)
Comments	Specify follow-up notes about case.	Text Area (32 KB)

Create Cases Individually

To create cases

1. In the **Cases** module, click **New Case**.
2. In the *Create Case* page, enter the case details.
3. Click **Save**.

To create cases instantly

1. Click the **Cases** tab.
2. On the left pane of the *Home* page, select **Cases** from the **Quick Create** list.
3. In the pop up window, enter the relevant details.
4. Click **Save**.

To create duplicate cases

1. Click the **Cases** tab, click a particular case that you want to be duplicated.
2. In the *Case Details* page, click **Clone**.
3. In the *Clone Case* page, modify the required case details.

4. Click **Save**.

Note:

- Before importing cases into Zoho CRM, you must have the case details in a CSV/XLS file.
- You must have privilege to import the cases in Zoho CRM.
- Before importing the cases into Zoho CRM close the CSV/XLS file and the Spreadsheet program.
- Remove apostrophe from any place in the CSV file (For example, ABC's).
- You can import a maximum of 1000 cases in one import cycle.

Associate Case with Other Records

You can create a 360-degrees view of the Case to display all the associated details, such as potentials, cases, open activities, history of the completed activities, attachments, and notes.

To attach documents

This feature enables you to attach documents, spreadsheets and presentations to the cases. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

To add notes

1. In the *Case Details* page, the existing note details, if any, are displayed.
    - Click **Title**, **Note Content**, **Modified Time**, **Created Time**, or **Owner Name** links to sort the display order of the records.
    - Click the relevant **Edit** or **Del** link to modify or delete the notes respectively.
2. Click **New Note** and do the following:
    a. Enter the **Note Title**. It is mandatory.
    b. The system displays the name of the lead's **Owner**. Click to change the owner's name.
    c. Enter the **Note Content** in the text box.
3. Click **Save**.

To create tasks or events

1. In the *Case Details* page, the existing task or event details, if any, are displayed.
    - Click **Subject**, **Activity Type**, **Status**, **Due Date** or **Owner Name** links to sort the display order of the records.
    - Click the relevant **Edit**, **Del**, or **Close** link to modify, delete, or close the task respectively.
2. Click **New Task/New Event/Log a Call** and specify the relevant details.

Note: Once the activity is over, you can close the activity using the **Close** link.

Approve Cases Captured through Website

By default, cases captured through Website are assigned to one of the Customer Support Administrator who can update the cases with additional information and assign to the corresponding Support Agent in your organization. It will allow your Support Agents focus mainly on the cases assigned to them.

Availability

Editions	**Enterprise**	**Professional**	**Free**
	YES	**YES**	**YES**
Permission Required	**Approve Web-to-Cases**		

To approve cases from Website

1. Click the **Cases** tab.
2. In the *Cases Home* page, under *Case Tools* section, and click the **Approve Cases** link.
3. In the *Case Approval* page, select the cases for approval.
4. Click **Approve**.

Set up Case Assignment Rules

You can setup case assignment rules based on your organization-wide case distribution (based on product support) process so that cases generated through import tool are automatically assigned to the respective support agents.

Availability

Editions	Enterprise	Professional	Free
	YES	YES	NO
Permission Required	Manage Cases Assignment Rules		

Case Assignment Workflow

1. Create case assignment rule.
2. Associate rule entries to the assignment rule, which contains matching criteria, selecting user, and adding default workflow task.
3. Select the required assignment rule in "case import tool"
4. During case importation, first assignment rule is evaluated and the cases are assigned to the Zoho CRM users according to the matching criteria.

Limitations

- You can create up to 20 different case assignment rules.
- In each assignment rule, you can associate up to 20 different criteria.
- Though you set multiple rules, users can select only one rule at a time.
- Case assignment rule can be used only for the cases generated through import tool and Web-to-Case form. You cannot assign cases to users if you are creating manually.

To set up case assignment rules

1. Click **Setup** > **Case Settings** > **Assignment Rules**.
2. In the *Case Assignment Rules* page, click **Create New Rule**.
3. In the *New Rule* page, enter the **Rule Name**, and then click **Save**.

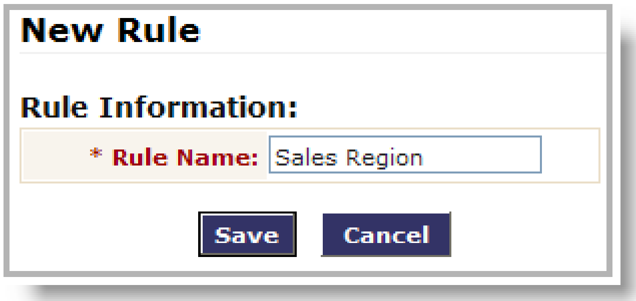
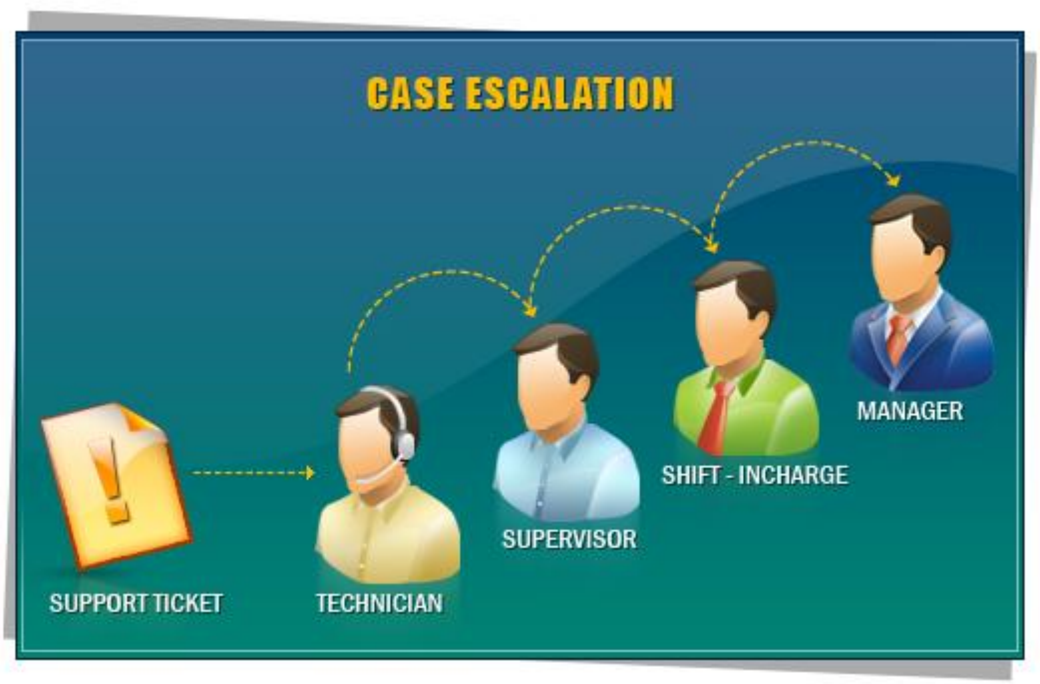


Figure 36: New Rule

4. Click **Create Rule Entry**.
5. In the *Rule Entry* page, do the following:
    - **Specify Criteria**: Select the matching criteria to evaluate the rule.
    - **Select User**: Select the user to whom the contact has to be assigned.
    - **Add Task**: Select the workflow task to be assigned.
6. Click **Save**.

Set up Case Escalation Rules

It often happens that the cases are not attended by the person to whom it is assigned. This option enables you to configure an escalation rule by which the cases are escalated to the other members in operational hierarchy, depending on the distribution rules of an organization.



Notes:

- At a time, you can activate only ONE Escalation Rule.
- If a newly created rule is set as active then the existing active rule will get deactivated.

Availability

Editions	**Enterprise**	**Professional**	**Free**
	YES	**NO**	**NO**
Permission Required	**Configure Cases Escalation**		

To set the Case Escalation Rule

- Enable the Escalation Scheduler
- Set up Case Escalation Rule
- Create Rule Entry
- Define Escalation Action for the Rule Entry

Part 1 - Enable the Escalation Scheduler

The Escalation Scheduler should be enabled prior to creating the Case Escalation Rule.

1. Click **Setup** > **Case Settings** > **Case Escalation Rules**.
2. In the *Case Escalation Rules* page, click **Enable Escalation Scheduler**.

Note: To disable Case Escalation Scheduler, click the **Close** link in the *Case Escalation Rules* page.

Part 2 - Create Case Escalation Rule

1. Click **Setup** > **Case Settings** > **Case Escalation Rules**.
2. In the *Case Escalation Rule Name* page, click **New Case Escalation Rule**.
3. In the *Create Case Escalation Rule Name* page, enter the **Case Escalation Rule Name**.
4. Select the **Active** check box.
5. Click **Save**.

Note:

- Activating any Rule, automatically deactivates the existing active Rule

- After creating case escalation rule, you need to create the rule entry.

Part 3 - Create Rule Entry

1. Click **Setup** > **Case Settings** > **Case Escalation Rules**
2. In the *Case Escalation Rule Name* page, select the case escalation rule name from the list.
    - Click **Rename** or **Del** link to rename or delete the corresponding rule respectively.
3. Click **Create Rule Entry**.
4. In the *Rule Entry* page, specify the criteria for the rule.
5. In the *Rule Entry* details, do the following:
6. Select your organization's **Business Hours**.

    Note, that you should have already defined the business hours.
7. Select the option from the list based on which the **Escalation Time** is set.
8. Click **Save**.

Note: Once the Rule Entries are created, you can click Reorder and specify the escalation order of the rules.

Part 4 - Define Escalation Action for the Rule Entry

1. In the *Case Escalation Rule* page, click the **Rule Entries'** criteria from the list.
2. In the *Rule Entry* page, the rule entry details are displayed.
3. Click **New Escalation Action**.
4. In the *New Escalation Action* page, do the following:
    a. Select the **Age of Escalation Actions** from the list.
    b. Select the person to whom the case needs to be escalated from the **Escalate To** pick list.
    c. Select the **Escalate Template** from the list.
    d. Select the owner for the escalation case from the pick list.
    e. Select the e-mail template from the list used to **Notify Assignee**.
    f. Enter the **Additional Emails**, if any.
5. Click **Save**.

Chapter 21

Solution Management

In This Section:

- Create Solutions
- Associate to Other Records

CHAPTER 21

SOLUTION MANAGEMENT

Over a period, direct customer support helps your organization to build a rich knowledge base for future reference. Knowledge Base in the form of solutions (also called as articles or frequently asked questions) enables your organization in solving the repetitive problems encountered by customers with limited resources. Solutions module integrated with Cases is very useful for organizations that are mainly focusing on post-sales support, particularly technology and knowledge-based industries.

Availability

Editions	Enterprise	Professional	Free
	YES	YES	YES
Permission Required	Solutions Tab		

Create Solutions

In Zoho CRM, you can create solutions by:

- Entering data in solution details form
- Duplicating the solution with few changes from the existing details
- Importing solutions from other applications

In the Solutions Edit form, you need to specify the solutions details. The following table provides descriptions of the various fields in the form.

List of Standard Solutions Fields

Field Name	Description	Data Type
Solution Title*	Specify the subject of the solution.	Text box, Alphanumeric (255)
Solution Owner	Select the Zoho CRM user's name to which the solution is assigned.	Pick list
Status	Select the status from the list	Pick list
Product	Select the name of the product to which the	Lookup

Field Name	Description	Data Type
Name	solution has to be associated.	
Question*	Specify the Question.	Text box
Answer*	Specify solution details.	Text box

Note:

- You can add comments only in the edit mode.
- The Add Comment field will not be available while creating the solution.

Create Solutions Individually

To create solutions individually

1. Click the **Solutions** tab, click **New Solution**.
2. In the *Solutions Home* page, enter the solution details.
3. Click **Save**.

To create solutions instantly

1. Click the **Solutions** tab.
2. On the left pane of the *Home* page, select **Solutions** from the **Quick Create** list.
3. Enter the relevant details.
4. Click **Save**.

To create duplicate solutions

1. Click the **Solutions** tab, click a particular solution that you want to be duplicated.
2. In the *Solution Details* page, click **Clone**.
3. In the *Clone Solution* page, modify the required solution details.
4. Click **Save**.

Note:

- Use the CSV/XLS file format.
- The import file should contain the header column to map the data with Zoho CRM.

- Disable the Sort filter in import file (In import file, disable the filter option by Data à Filter à AutoFilter).
- Before importing the solutions into Zoho CRM close the import file and the corresponding Spreadsheet program.
- Remove apostrophe if present anywhere in the import file.
- You can import a maximum of 1000 solutions in one import cycle.

Attach Documents to the Solution

You can attach additional documents to the solution.

To attach documents

This feature enables you to attach documents, spreadsheets and presentations to the solution. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

PART V

DATA ANALYTICS

In This Section:

- Data Analytics in ZCRM

CHAPTER 22

INTRODUCTION

In This Section:

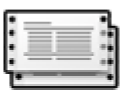
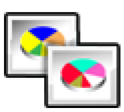
- Introduction to Data Analytics

CHAPTER 22

REPORTS & DASHBOARDS

Zoho CRM enables fully customizable reports in all the modules with more flexible options, such as cross-linking modules, arithmetic operations, different types of layouts, 3-level column grouping, public/private folders, scheduling reports generation and delivering to the intended users including non-Zoho CRM users through e-mail. In addition, 40 plus standard reports are packed in various modules, which can be used as a ready reference and enhance the learning experience.

Dashboards give a real-time snapshot of your organization's key metrics. Using dashboards you can easily visualize comparisons, patterns, and trends in sales, marketing, support, and inventory related data. The Zoho CRM solution dashboard comprises of different types of two-dimensional/three-dimensional (2D/3D) charts, which are generated dynamically built over the Macromedia Flash technology. The unique chart is the Funnel chart, which can be used to visualize the sales pipeline at various stages intuitively.

	**Reports** Presentation of data or records for various modules as per requirement. **Create Reports | Create Report Folders | Schedule Reports | Export Reports**
	**Dashboards** A pictorial representation of your custom report data, which gives a real-time snapshot of your organization's key metrics. **Create Dashboards | Create Dashboard Folders | Create Charts**

CHAPTER 23

REPORTS

In This Section:

- Create Reports
- Schedule Reports
- Delete Reports
- Export Reports

CHAPTER 23

REPORTS

Zoho CRM reports are the detailed and informative list of records. Each report provides access to important data required for various purposes. In Zoho CRM, standard reports are provided in various modules, which can be either used as it is or customized further as per your business requirements.

Availability

Editions	**Enterprise**	**Professional**	**Free**
	YES	**YES**	**YES**
Permission Required	**Reports Tab**		

View Reports

Zoho CRM provides more than 40 different standard reports for the users' benefit. These reports are distributed across different modules in Zoho CRM. You can use the standard reports or customize them as per your business requirements.

List of standard Reports

Report Name	Description
Account and Contact Reports	
Contact Mailing List	Display the list of contact address details.
Key Accounts	Displays the accounts that give you more sales revenue.
Accounts by Industry	Displays the accounts from various industries.
Potential Reports	
Pipeline by Stage	Displays the potentials by their stage.
Potentials Closing by this Month	Displays the potentials that are closing during the current month.

Report Name	Description
Sales Person's Performance Report	Displays the potentials gained by each sales person.
Lost Potentials	Displays the potentials that are lost.
Potentials by Type	Displays the potentials by their type.
Open Potentials	Displays the potentials that are pending.
Pipeline by Probability	Displays the pipeline of the potentials by their probability.
Sales By Lead Source	Displays the sales from various lead sources.
This Month Sales	Displays the sales that has happen during current month.
Today's Sales	Displays the sales that has happen today.
Stage Vs Potential Type Report	Displays the sales vs potentials report
Lead Reports	
Leads By Source	Displays the leads from various sources.
Leads By Status	Displays the leads and their status.
Today's Leads	Displays the leads that are created today.
Leads by Ownership	Displays the leads and the corresponding owners.
Converted Leads	Displays the leads that are converted into Account / Potential / Contact.
Leads by Industry	Displays the leads from various vertical industries.
Activity Reports	
Tasks and Events Report	Displays the list of all the tasks and events.
Today's Calls	Displays the list of current day's inbound and outbound calls.
Campaign Reports	
Campaigns Revenue Report	Display the revenue generated from the campaign.
Campaign Leads	Displays the leads that are generated through the campaign.

Report Name	Description
Case & Solution Reports	
Popular Solutions	Displays the number of comments for solutions.
Cases By Origin	Displays the cases based upon their origin.
Cases By Status	Displays the cases based upon their status.
Cases By Priority	Displays the cases based upon their priorities.
Cases By Comments	Displays the cases with the number of comments count.
Sales Forecast Reports	
Quarterly Forecast Summary	Displays the quarterly forecasts that includes committed amounts, best-case amounts, and pipeline by quarter.
Forecast History Report	Displays the life cycle of the forecast.
Product Reports	
Products by Category	Displays the products based upon their category.
Products by Support Termination date	Displays the products list whose support discontinued during the current month.
Products by Cases	Display the products and with the list of cases associated with the products.
Vendor Reports	
Amount by Vendors	Displays the vendors based on the amount
Vendors Vs Purchases	Displays the vendors based on the purchases made from the vendors.
Quote Reports	
Quotes by Accounts	Displays the quotes based on accounts.
Quotes by Stage	Displays the quotes based on their stages.
Sales Order	

Report Name	Description
Reports	
Sales Orders by Accounts	Displays the sales orders based on accounts.
Sales Orders by Status	Displays the sales orders based on their status.
Sales Orders by Owner	Displays the sales orders based on their owners.
Purchase Order Reports	
Contacts Vs Purchases	Displays the contacts based on purchases.
Purchase Orders by Status	Displays the purchase orders based on their status.
Invoice Reports	
Invoices by Accounts	Displays the invoices based on their accounts.
Invoices by Status	Displays the invoices based on their status.

Note: You cannot delete the above standard reports.

To access standard reports in Reports tab click the specific report (For example, Contact Mailing List from the Accounts & Contacts Reports) from the Reports folder (for example, Accounts & Contacts Reports, Potentials reports, and others).

To view the report

1. Click the **Reports** tab.
2. In the *Reports Home* page, click the required reports' group.

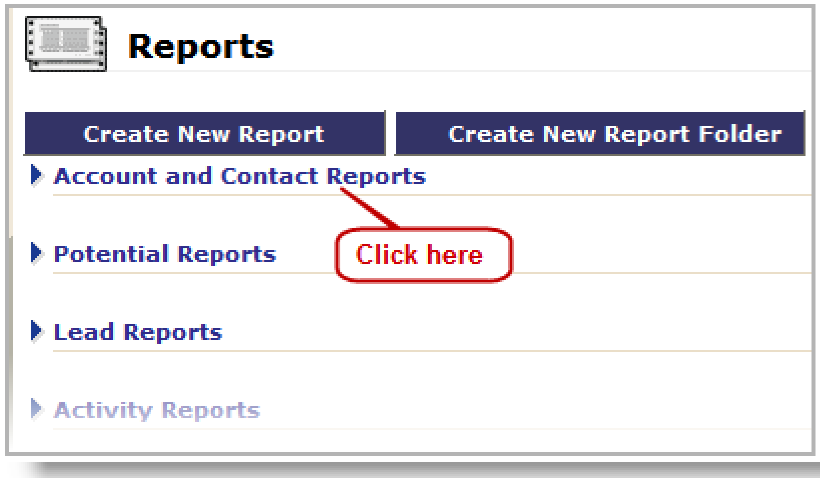


Figure 37: New Report

3. From the list of reports that are displayed, click the required report's link.
4. Click the **Customize** link next to the report to customize the report.

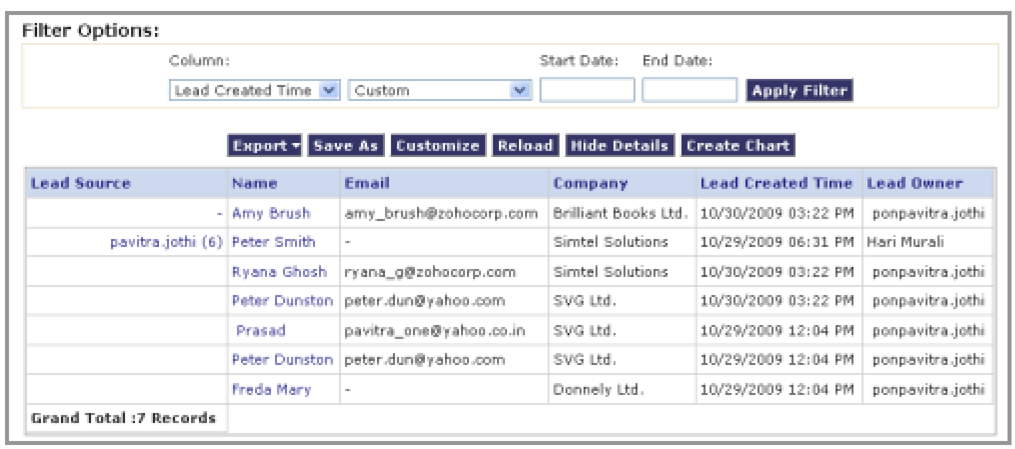


Figure 38: Customize Report

5. In the *Reports* page, you can do the following:

- **Export**: Use this option to export and save the report in Excel, PDF, or CSV format in your local disk.
- **Save As**: Use this option to save the report with a new name. This option is useful when you filter a specific set of data and save it for future reference.
- **Customize**: This feature is used to customize the report with regards to the report types, columns, grouping, filter criteria in the report, etc.
- **Reload**: Use this option to update or refresh the contents of the page.

- **Hide Details/Show Details**: Click Hide Details to hide the details of the report and click Show Details to see the hidden details of the report.
- **Create Chart**: This feature enables you to create charts, (such as Bar diagrams, Pie charts, Line charts, Funnel charts) based on the selected report details.

6. Do one of the following, and then click Apply Filter to view reports based on the filter options specified:

    - Select Last Created Time or Last Modified Time from the Column list.
    - Select the option from the adjacent list. (Next FQ, for example).
      On selecting this option, the system will automatically display the Start and End date in the respective boxes.
    - Enter the Start Date and the End Date in mm/dd/yyyy format, or select the date from the calendar displayed.

Note:

- FQ refers to Financial Quarter and FY refers to the Financial Year.
- You can view a maximum of 2000 records in a report.

Create Reports

You can create new module-specific reports linking some of the other cross-functional modules. For example, you can create a report in accounts module linking other modules such as Contacts, Potentials, Quotes, and others.

List of Primary modules and the related Secondary modules

In the Create Report form, you need to specify the primary module and the related secondary modules (optional). The following table provides various primary modules and the related secondary modules.

Primary Module	Secondary Modules
Leads	None
Contacts	Accounts, Potentials, Quotes, and Orders
Accounts	Potentials, Contacts, Products, Quotes, and Invoices

Primary Module	Secondary Modules
Potentials	Accounts, Contacts, and Quotes
Activities	Contacts
Products	Accounts and Contacts
Cases	Products
Solutions	-
Quotes	Accounts, Contacts, and Potentials
Orders	Contacts
Invoice	Accounts
Email	Leads, and Contacts

Types of Report

- **Tabular Report**: Displays the data without any subtotals in the report. Use this type of report to create contact mailing lists, consolidated view of sales pipeline, and others.
- **Summary Report**: Displays the data along with subtotals, groupings, and other summary information.
- **Matrix Report**: Displays the data summarized in a grid against both horizontal and vertical columns.

Customize Reports

You can create new reports according to your organization's requirements. The customization of a report involves the following steps:

- Select the module and the corresponding cross-functional modules
- Select the report type (Tabular, Summary, or Matrix report)

- Select the report columns
- Group the columns
- Select the arithmetic functions
- Specify the advanced sorting filters
- Save the report in folder

Availability

Editions	**Enterprise**	**Professional**	**Free**
	Unlimited	**Unlimited**	**5 Reports**
Permission Required	**Manage Reports And Dashboards**		

Note: You can customize the standard reports as per your requirements by clicking the Customize link in the Reports Home page. Once customized, you cannot revert to the default report.

To select module and the cross-functional modules

1. Click the **Reports** tab.
2. In the *Reports Home* page, click **Create New Report**.
3. In the *Create Report* page, do the following:
    a. Select the primary module from the **Modules** drop-down list.
    b. Select the cross-functional modules from the **Related Modules** list box.
4. Click **Continue**.

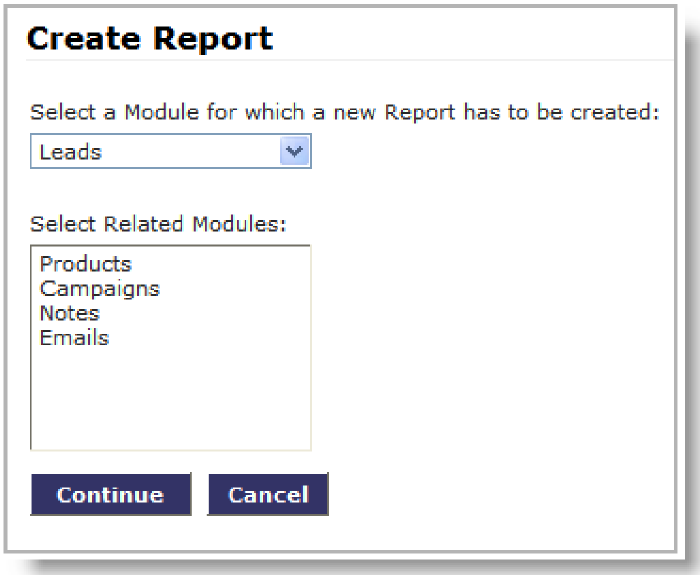


Figure 39: Create Report

Note: The system will display the column names (in the Columns tab) only for those modules that you select here.

To select the report type

1. In the *Create Report* page, under the **Report Type** tab, select one of the following report options:

   - Tabular Report
   - Summary Report
   - Matrix Report

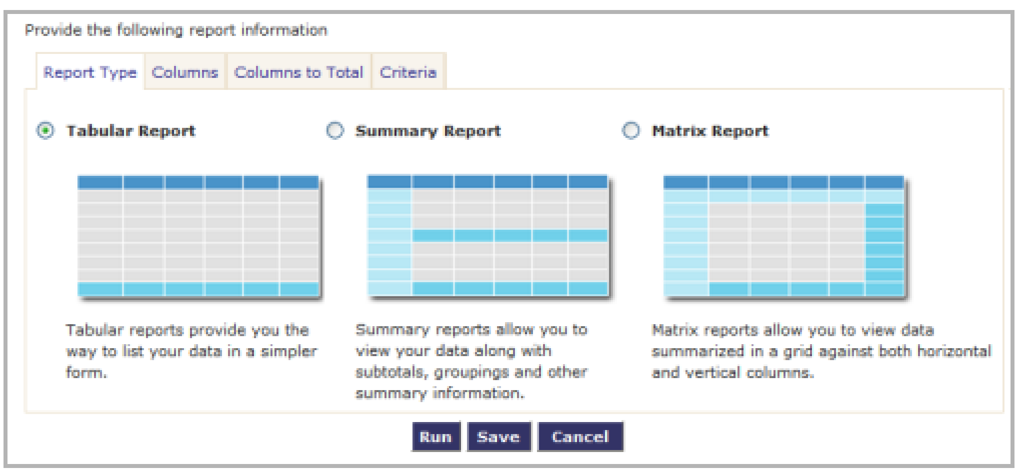


Figure 40: Types of Reports

Note:

- When you select the Summary Report, the **Grouping** tab will also be available.
- You can **Run** or **Save** the report at any point while creating it.
- When you click the **Run** button, the system will prompt you to save the report. The report is saved temporarily and then a preview of the report is generated.
- When you click the **Save** button, the report is saved in the folder that you specify.

To select the report columns

1. In the *Create R*eport page, click **Columns** tab.
2. Do the following to select the columns to be displayed in your report:

    a. Select the columns from the **Available Columns** list box.
    b. Click **Add**.
    c. The columns will be added to the **Selected Columns** list box.
    d. Use the (Up) and (Down) arrow keys to sort the display order of the columns.
    e. Select the column name and click to delete the selected column.

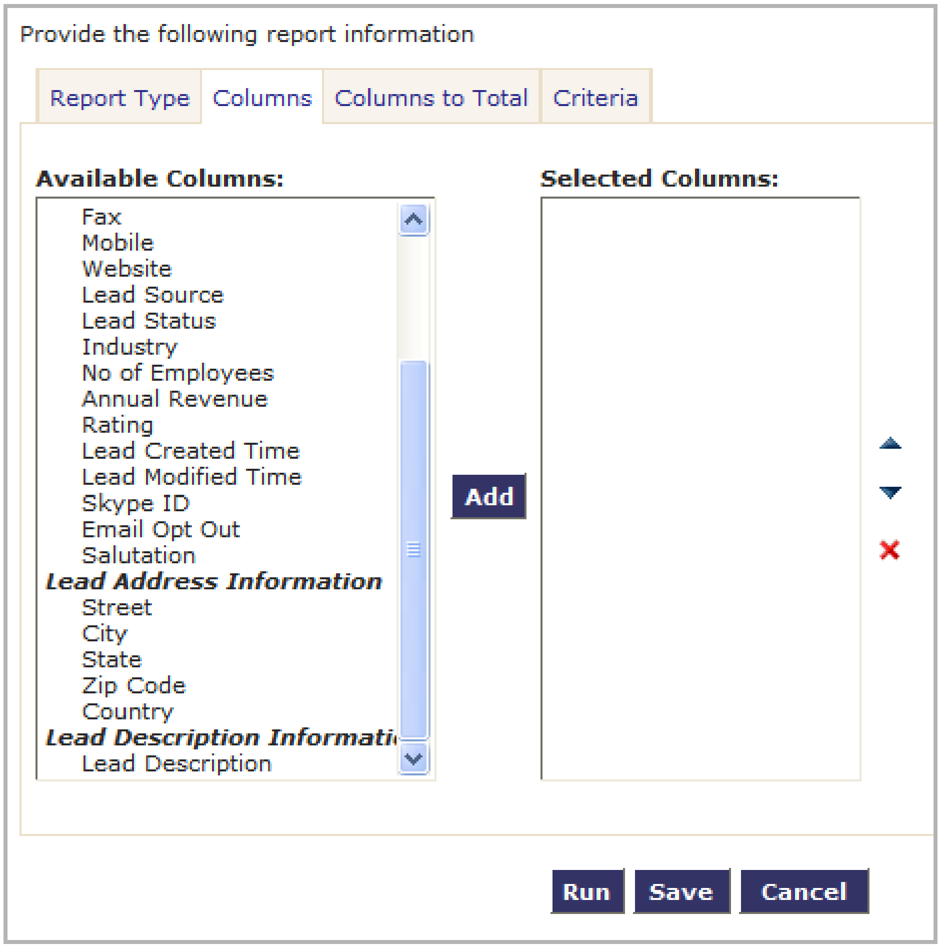


Figure 41: Columns

3. Click **Save**.

   In the pop up window, specify the **Report Name**, **Description**, and **Report Folder** details.

4. Click **Run** to save the report first, and then run it.

5. Once you have selected the report columns, click the **Grouping** tab if you are using Summary Report otherwise click the **Columns to Total** tab (refer Step 5).

To group report columns

1. In the *Create Report* page, click the **Grouping** tab.

   This tab will be available only when you select Summary Reports under the **Report Type** tab.

2. In the *Grouping* page, you can group the records based on the grouping criteria that you specify.
3. Select the values from the respective lists.
4. Select **Ascending** or **Descending** from the list.

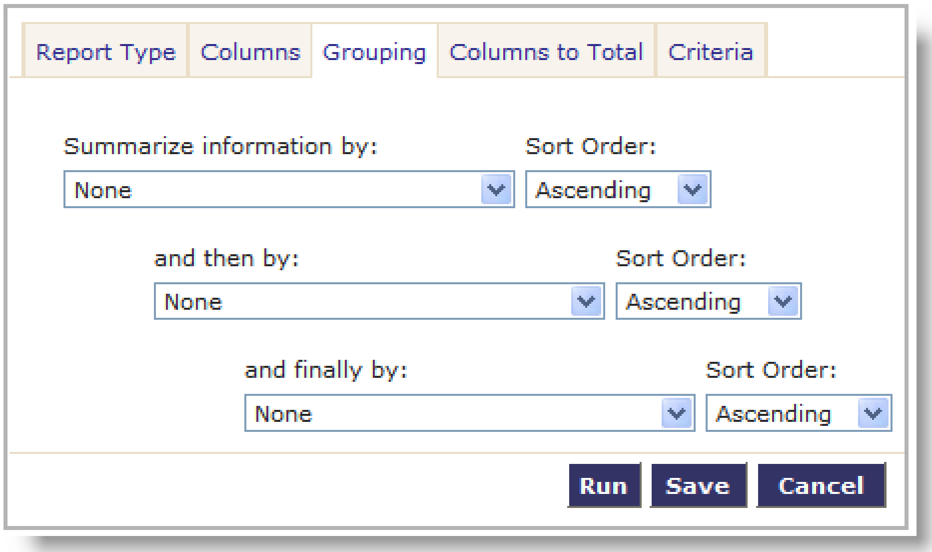


Figure 42: Grouping

To select the arithmetic functions

1. In the *Create Report* page, click the **Columns to Total** tab.
2. In the *Columns to Total* section, select the required arithmetic functions (Sum, Average, Lowest Value, Largest Value).

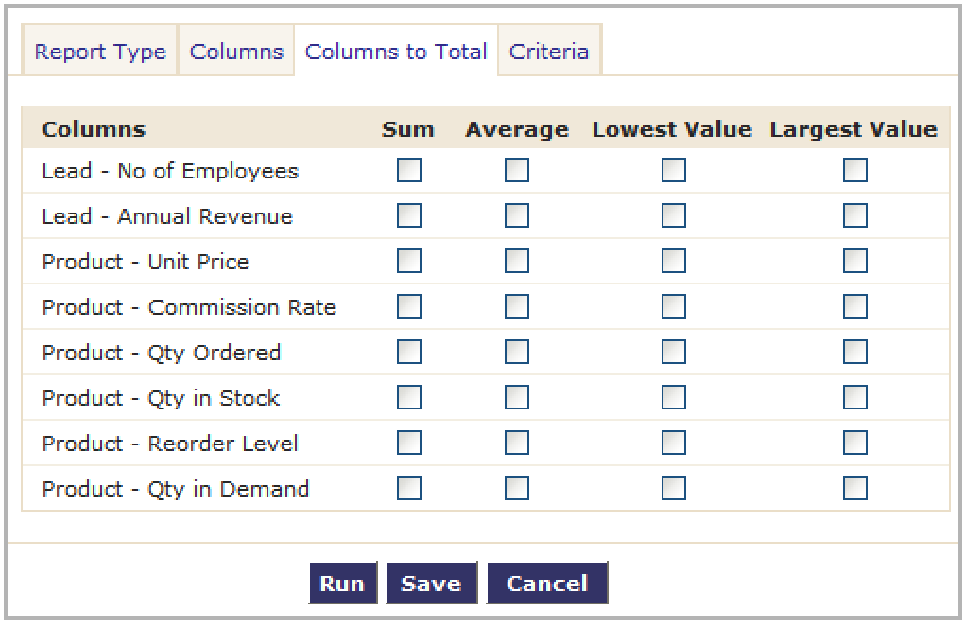


Figure 43: Columns to Total

To specify advanced sorting filters

1. In the *Create Report* page, click the **Criteria** tab.
2. In the *Criteria* section, select the additional criteria for the report.

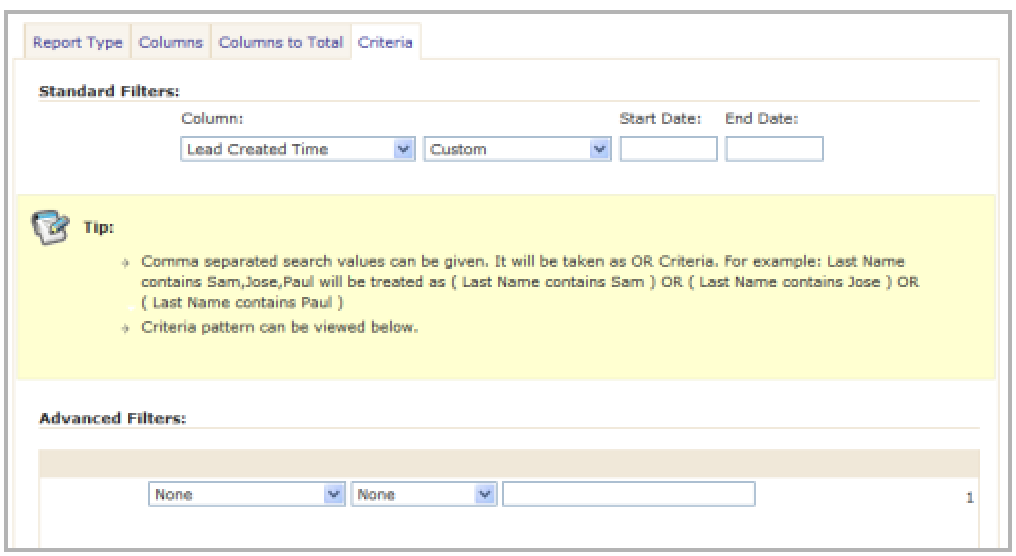


Figure 44: Criteria

3. Once you have completed the report customization, do one of the following:

a. Click **Run** to preview the report.

b. Click **Save**.

c. Click **Cancel**.

Note: You can also use a Record's Created By and Modified By fields to define a criteria.

To save report in folder

1. In the *Create Report* page, click **Run** or **Save**.

   Note, that you can run the report only after you save it.

2. In the *Save Report* dialog box, do the following:

   a. Enter the Report Name.

   b. Enter the Description of the report.

   c. Select the Report Folder in which the report has to be stored.

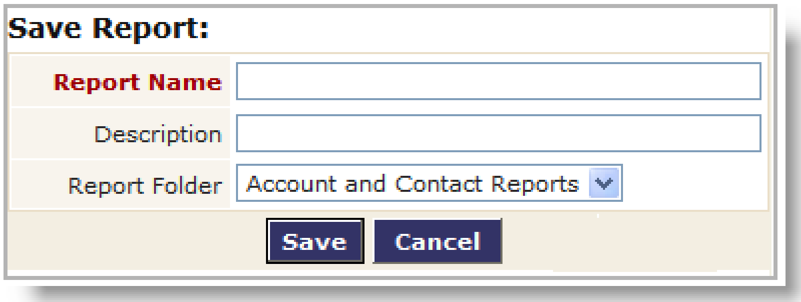


Figure 45: Save Report

3. Click **Save**.

Create Report Folders

By default, reports are stored in different categories. You can create personal/public folders to store the frequently used reports in a common folder for easy access.

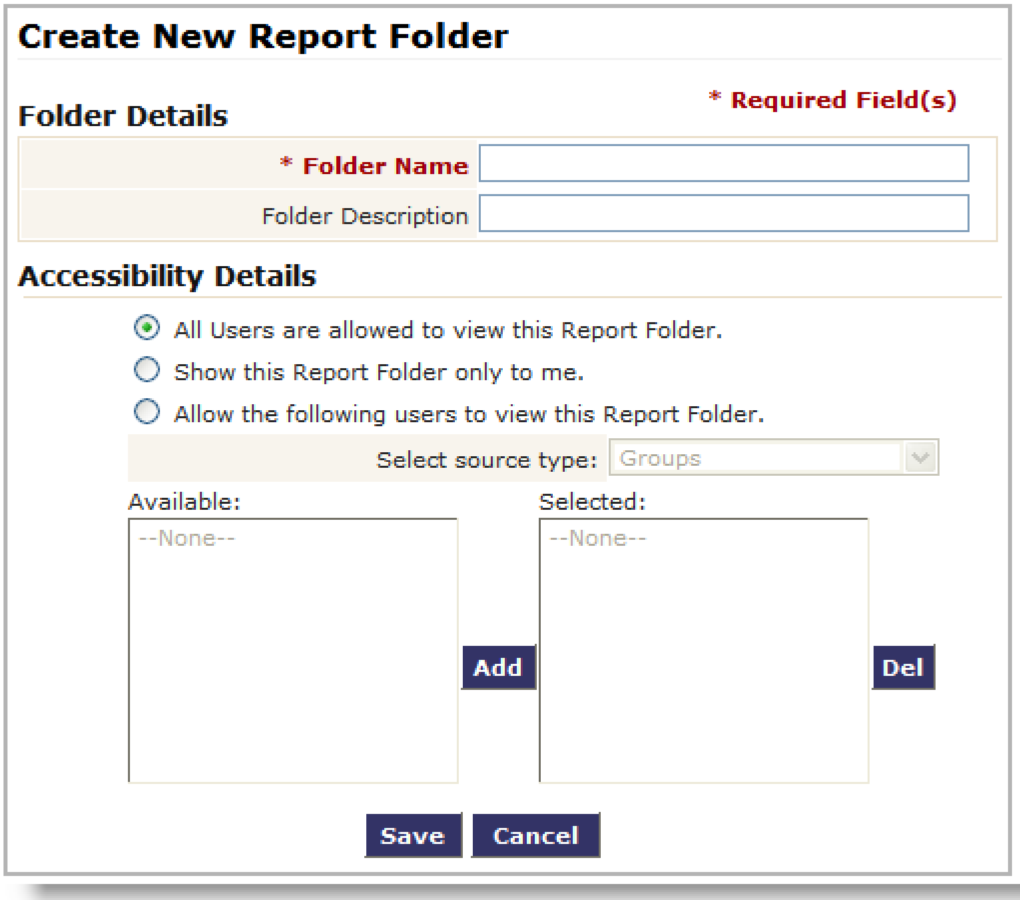


Figure 46: Report Folder

To create report folders

1. Click the **Reports** tab.
2. In the *Reports Home* page, click **Create New Report Folder**.
3. In the *Create New Report Folder* page, do the following:

    a. Enter the **Folder Name**.

    b. Enter the **Folder Description**.

    c. Select **Accessibility Details**:

    - **All Users are allowed to view this Template Folder:** Select if you would like to enable the folder access for all the users.
    - **Show this Template Folder only to me:** Select if you would like to enable the folder access only to you.
    - **Allow the following users to view this Template Folder:** Select the users or user roles that can access the folder.

4. Click **Save**.

Schedule Reports

You can automatically send the reports to your colleagues, executives management and other non-Zoho CRM users by scheduling the reports daily, weekly, monthly or yearly. Once the Report scheduler is configured, report will be delivered to recipients as an email attachment (XLS format).

Note: You can create any number of report schedulers but only a maximum of 40 schedulers can be active in the Enterprise Edition and 25 schedulers in the Professional Edition.

Availability

Editions	**Enterprise**	**Professional**	**Free**
	YES	**YES**	**NO**
Permission Required	**Schedule Reports**		

The following table provides various field names in scheduling reports.

Field Name	Description	Remarks
Schedule Name	Specify the schedule name	Mandatory field
Select Report	Select the report from the drop-down list	Mandatory field
Active	Specify the scheduler status	Check box
Start Date	Specify the start date of scheduling the report	Mandatory field. The standard date format is mm/dd/yy
Start Time	Specify the time when the report has to be generated and sent to the recipients	Mandatory field. The standard time format is hh:mm
Repeat	Specify the frequency of the report scheduler from the drop-down list. You can select one of the options: daily, weekly, monthly, or yearly.	Drop-down list
Recipient	Specify the recipients from the list.	List

Field Name	Description	Remarks
Details		
Recipient Email	Specify the email IDs separated by comma	Text box

To setup report scheduler

1. Click the **Reports** tab.
2. In the *Reports Home* page, click **Reports Scheduler**.
3. In the *Scheduled Reports* page, existing schedulers, if any, are displayed.
4. Click **New Report Schedule**.

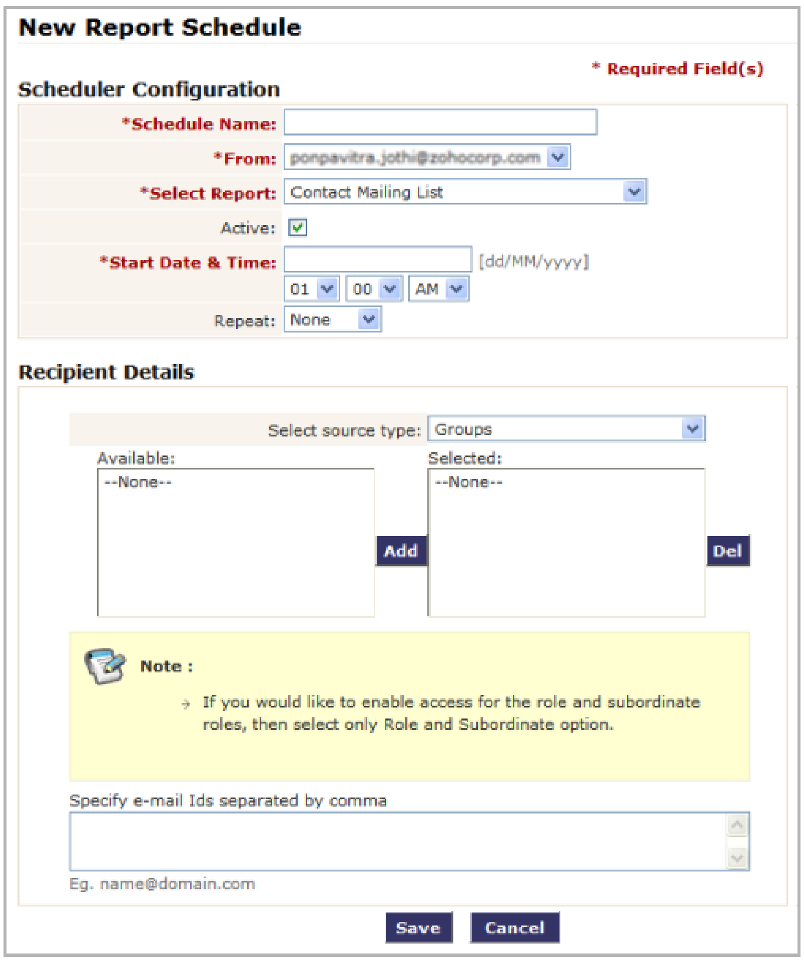


Figure 47: Reports Scheduler

5. In the New *Report Schedule* page specify the values (Refer the Report Scheduler fields table).
6. Click **Save**.

Export Reports

You can export the reports data in to XLS, CSV, PDF and HTML formats, which can be used for further data analysis purpose.

To export reports

1. Click the **Reports** tab.
2. In the *Reports Home* page, select the report from the required module.

   For example, Lead by Source from the Leads module.
3. In the report page, select one of the following options:

   - **Export to Excel**: To save the report in *.XLS format
   - **Export to CSV**: To save the report in CSV format
   - **Export to PDF**: To export the report in PDF

Note: Using the Export function maximum of 5000 records can be exported. To get more than 5000 records, a complete backup must be requested for which there will be a charge of 10$ per request.

Delete Reports

Periodically you may delete some of the unnecessary custom reports.

To delete reports

1. Click the **Reports** tab.
2. In the *Reports Home* page, click the **Del** link.

Note:

- You can delete only the reports created by you.
- The standard reports cannot be deleted, but can only be customized as per your requirements.

CHAPTER 24

DASHBOARDS

In This Section:

- Create Dashboards
- Create Charts
- Drill Down Dashboards

CHAPTER 24

DASHBOARDS

Dashboard is a pictorial representation of your custom reports, which gives a real-time snapshot of your organization's key metrics. Using dashboards, you can easily visualize the patterns, and trends in sales, marketing, support, and inventory related data. For example, you can have a glance at the products that are selling fast over a period of time, compare the current quarter sales with previous quarter sales, or compare the actual sales to the projected sales.

In Zoho CRM, dashboard comprises of different types of two-dimensional and three-dimensional charts (components). These charts are built with Adobe Flash technology, which displays the data dynamically. The various types of charts are bar, pie, line, table, or funnel. The unique feature in Zoho CRM is the Funnel chart, which can be used to visualize the various stages in sales pipeline.

Note:

- Please ensure that your Web browser supports Adobe Flash
- In case your browser does not support Adobe Flash plug-in, click the Flash plug-in icon to install it.

Availability

Editions	**Enterprise**	**Professional**	**Free**
	YES	**YES**	**YES**
Permission Required	**Dashboards Tab**		

Limitations

- Some of the international currency symbols will not be displayed properly.
- Dashboard properties (color, gradient, borders, background etc.) cannot be modified through user interface.
- Dashboards need to be refreshed manually to display the up-to-minute changes.

Create Dashboard Folders

Dashboards can be stored in publicly accessible folders for all the Zoho CRM users or private folders with a limited access to some of the users.

To create dashboard folders

1. Click the **Dashboards** tab.
2. In the *Dashboards Home* page, click the **Go to Dashboard** List link.
3. In the *Dashboard List* page, click **Create New Dashboard Folder**.

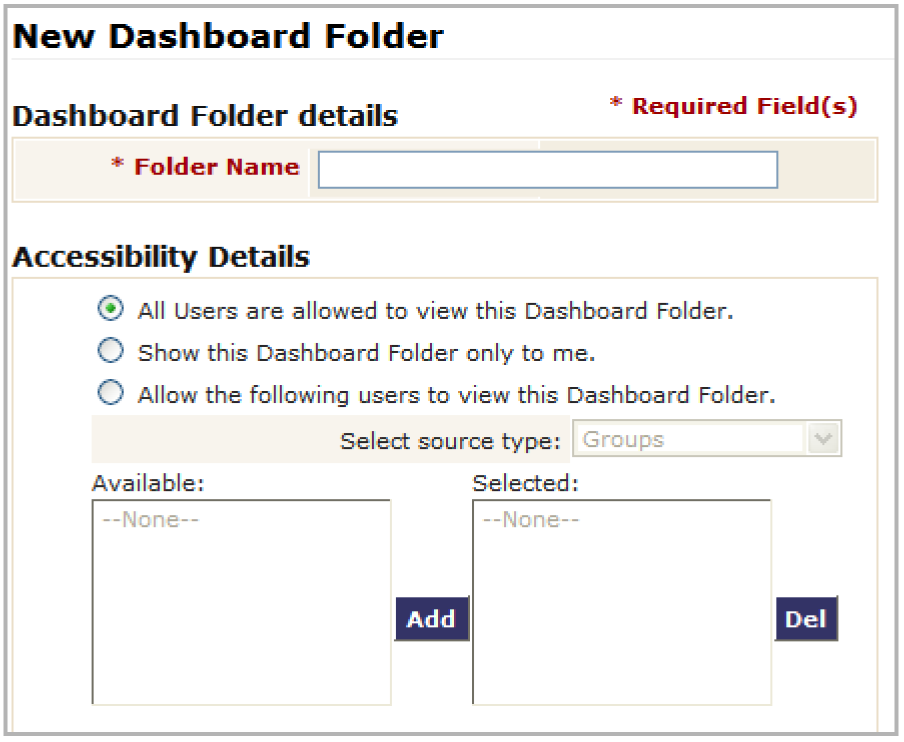


Figure 48: Dashboard Folder

4. In the *New Dashboard Folder* page, do the following:
   a. Enter the **Folder Name**.
   b. In *Accessibility Details* section, define the user's accessibility to view the dashboard folder.
5. Click **Save**.

Create Dashboards

Dashboard is a summarized view of the custom report data in Zoho CRM. It provides a platform for a real-time analysis on the sales stages and business operations.

Availability

Editions	Enterprise	Professional	Free
	Unlimited	Unlimited	3 Dashboards
Permission Required	Manage Reports And Dashboards		

List of Standard Dashboard Components

In the Dashboard home page the following types of dashboards are available.

Module	Standard Dashboard Components
Leads	• Leads by Source • Leads by Status • Sales by Lead Source • Leads by Industry
Accounts and Contacts	• Sales by Account • Accounts by Industry
Potentials	• Pipeline by Stage • Pipeline by Probability • Potentials by Type
Campaigns	• Campaign Leads • Campaign Vs Revenue
Cases and Solutions	• Cases by Origin • Cases by Priority • Cases by Status
Products	• Products by Category

Inventory Management	• Vendors Vs Purchases • Sales Orders by Accounts • Contacts Vs Purchases • Purchase Orders by Status • Quotes by Accounts • Quotes by Stage • Invoices by Accounts • Invoices by Status • Sales Orders by Status

Note: You cannot modify or delete the standard dashboards.

To create dashboards

1. Click the **Dashboards** tab.
2. In the *Dashboards Home* page, click the **Go to Dashboard** List link.
3. In the *Dashboard List* page, click **Create New Dashboard**.

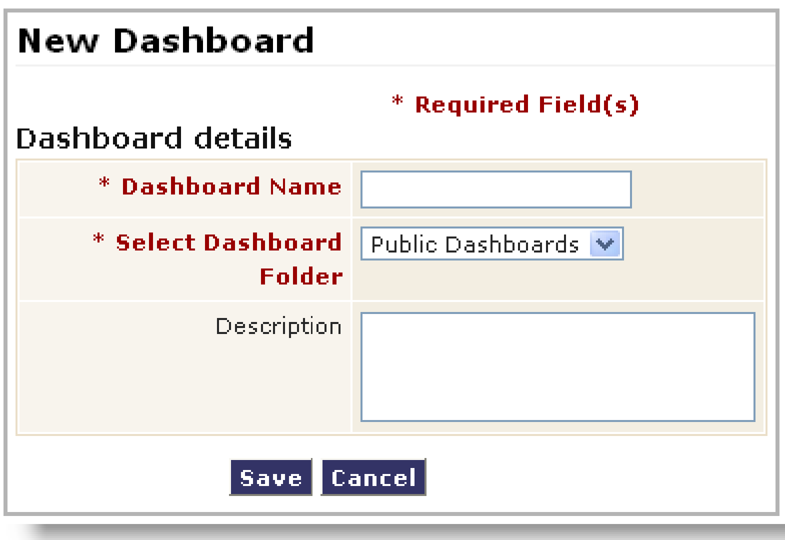


Figure 49: New Dashboard

4. In the *New Dashboard* page, do the following:

   a. Enter the **Dashboard Name**.

   b. Select **Dashboard Folder** from the list in which the dashboard has to be stored.

   c. Enter the **Description** of the dashboard.

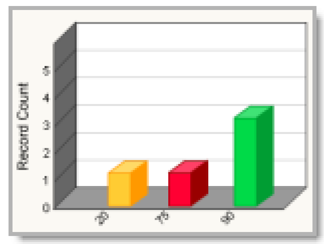
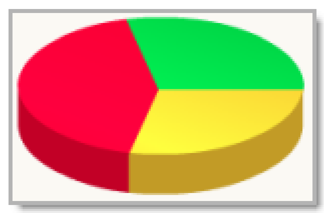
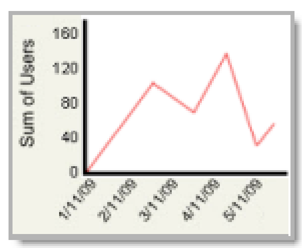
5. Click **Save**.

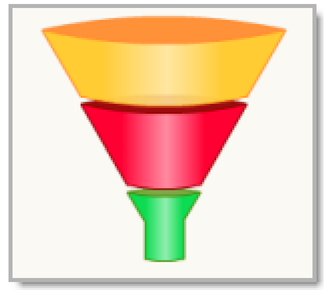
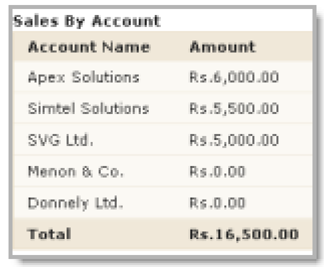
Create Charts

After creating a dashboard you must add components (charts, representing the exact data in pictorial form), which includes Bar, Pie, Line, Funnel, or Table charts.

You can select the charts to display the data in pictorial form and table to display the data in tabular format.

List of Standard Charts

Chart Type	Description	Example
Bar chart	To display two or more kinds of data, that can be used to compare values across categories.	
Pie Chart	To display data that is divided into triangular areas proportional to the percentages of the whole and used to illustrate the relationship of parts to the whole.	
Line Chart	To display a trend over a period with the variations in the multiple values in a single chart.	

Funnel Chart	To show the convergence of data from the entry level to exit level. It is typically used show the sales pipeline at any point of time.	
Table Chart	To show sum of the values in each category of the data.	

Sales By Account

Account Name	Amount
Apex Solutions	Rs.6,000.00
Simtel Solutions	Rs.5,500.00
SVG Ltd.	Rs.5,000.00
Menon & Co.	Rs.0.00
Donnely Ltd.	Rs.0.00
Total	**Rs.16,500.00**

To create report charts

1. Click the **Dashboards** tab.
2. In the *Dashboards Home* page, click **Add Component**.
3. In the *Add Component* page, do the following:
    a. Select the **Component Type**, either **Chart** or **Table**.
    b. Enter the **Component Name**
    c. Select the source of data for the report from the **Source Report** list.
4. Click **Next**.
5. In the *Add Component* page, select the type of chart from the **Select Chart Type** list box.
6. Under *Provide Chart Details*, the **X-Axis** and **Y-Axis** details are displayed.
7. Click **Finish**.

After adding a chart to the dashboard, you can perform the following operations:

- Delete the chart
- Edit the chart
- Drill-down the chart

- Change to 2-dimensional or 3-dimensional view
- Zoom out the chart

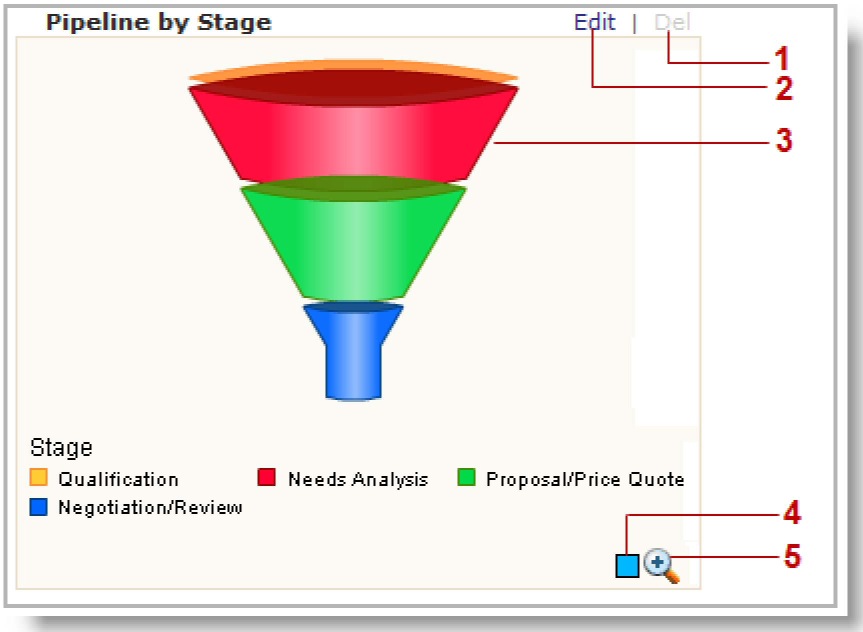


Figure 50: Zoom Out Chart

Note: You can delete only the custom charts created by you.

Drill Down Dashboards

This feature enables you to view a detailed report on the selected data in any dashboard report.

To drill-down dashboards

1. Click the **Dashboards** tab.
2. In the *Dashboards Home* page, select the dashboard from the **Switch to Dashboard** drop-down list.
3. In the selected dashboard, click on the data for which you need a detailed report.

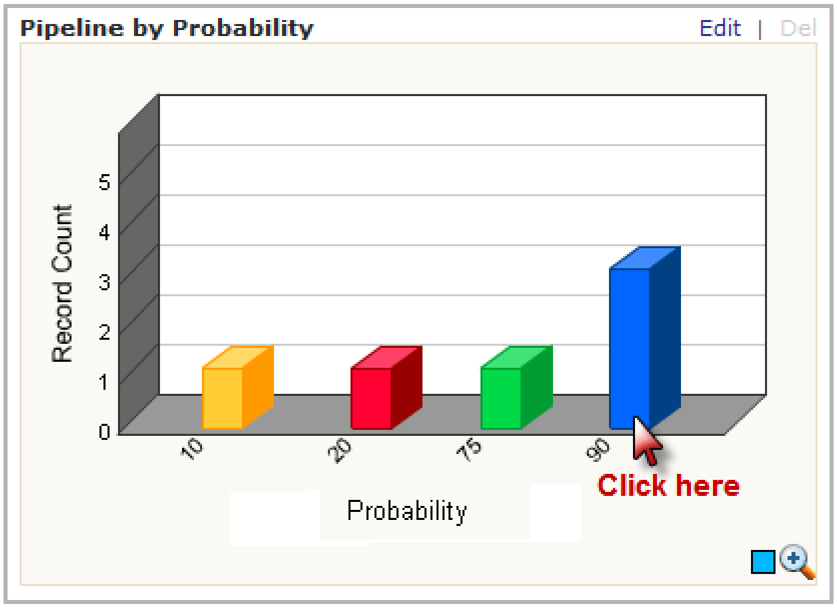


Figure 51: Drill Down Dashboard

4. The data is displayed in the form of a report.
5. In the *Report* page, you can export the data to PDF/XLS/CSV, save the report, customize it, or create a chart based on the details.

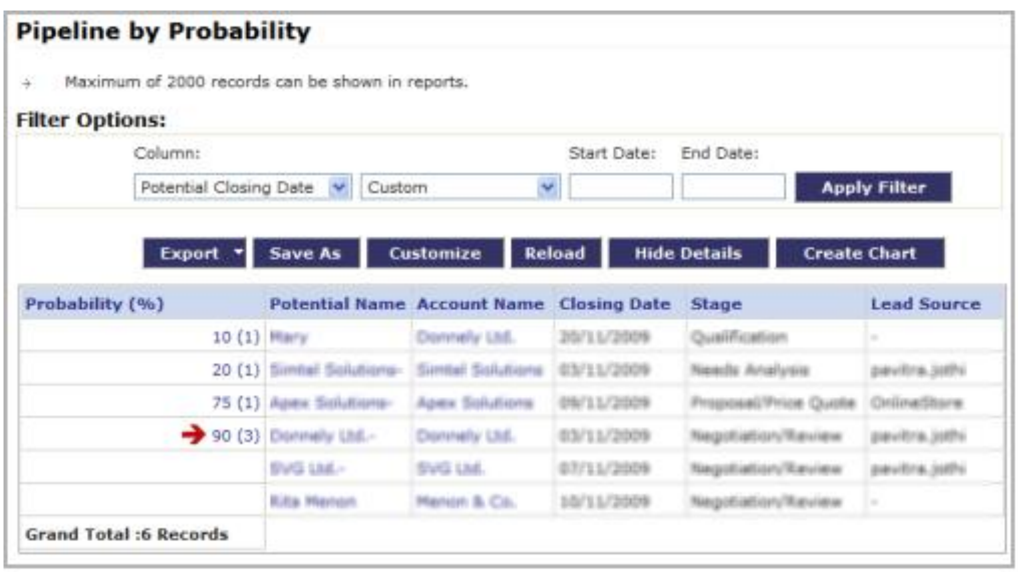


Figure 52: Export

Zoom in Charts

This feature enables you to zoom in and zoom out the chart for a better visualization of data, which is very useful while working with huge data.

To zoom in the charts

1. Click the **Dashboards** tab.
2. In the *Dashboards Home* page, select the dashboard from the **Switch to Dashboard** drop-down list.
3. In the *Dashboards Home* page, in the required chart click the  (Zoom icon).

   The enlarged chart is displayed in a separate window.

PART VI

ACTIVITIES

In This Section:

- Activity Management in ZCRM
- Task Management
- Event Management
- Log Calls

CHAPTER 25

TASK AND EVENT MANAGEMENT

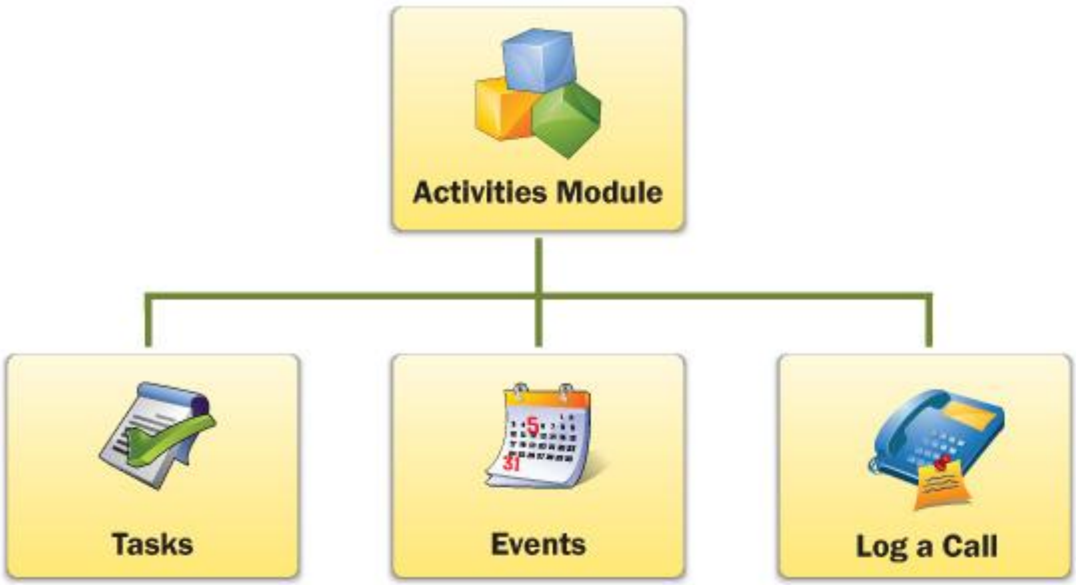
In This Section:

- Create Tasks and Events
- Create Recurring Activity
- Set Reminders

CHAPTER 25

TASKS AND EVENTS

Activities plays an important role in daily business operations. Activities can be either time bound calendar events, such as meetings, seminars, appointments, etc or status bound tasks, such as send status report to manager, send e-mail to customer, etc. In Zoho CRM, most of the records have activities as a related list for a better 360 degrees view. You can associate activities with modules, such as leads, accounts, contacts, potentials, campaigns, etc. Under the Activities Module, you can store information related to Tasks, Events, and Calls.



Availability

Editions	Enterprise	Professional	Free
	YES	YES	YES
Permission Required	Activities Tab		

Create Tasks

Task is a specific piece of work required to be done within a given time frame. They are listed in the Zoho CRM's Home page of the user, Activities home page, and in other related records.

To create tasks

1. Click the **New Task** link.

   Alternatively, click the **New Task** button from records, such as leads, accounts, contacts, potentials, cases, and others

2. In the *Create Task* page, specify the following details:

   - **Task Owner** - Select the owner of the task. By default, the user who creates the task is the owner.
   - **Subject** - Specify the subject of the task.
   - **Due Date** - Specify the due date for the task.
   - **Select Contact/Lead** - Choose the contact or lead name with which the task needs to be associated.
   - **Select Module** - Choose the module with which the task is associated. This field is available only if Contact is selected in the previous field.
   - **Status** - Choose the status of the task.
   - **Priority** - Choose the priority of the task.
   - **Send Notification E-mail** - Select the checkbox to send an email notification (about the task) to the task owner.
   - **Remind At** - Select the checkbox to set email or pop-up reminders.
   - **Description** - Specify additional details about the task.

3. Click **Save**.

Note: Tasks will be closed, only when the Status of the task is updated as Completed.

Create Events

Event is an activity that happens at a given place and time. They are listed in the Zoho CRM's Home page of the user, Activities home page, Calendar, and in other related records.

To create events

1. Click the **New Event** link.

   Alternatively, click **New Event** from records such as leads, accounts, contacts, potentials.

2. In the *Create Event* page, specify the following details:

   - **Event Owner** - Select the owner of the event. By default, the user who creates the event is the owner.

- **Subject** - Specify the subject of the event.
- **Start Date & Time** - Choose the starting date and time of the event from the calendar.
- **End Date & Time** - Choose the ending date and time of the event from the calendar.
- **Venue** - Specify the location of the event.
- **Select Contact/Lead** - Choose the contact or lead name with which the event needs to be associated.
- **Select Module** - Choose the module with which the event is associated. This field is available only if Contact is selected in the previous field.
- **Send Notification E-mail** - Select the checkbox to send an email notification (about the event) to the event owner.
- **Recurring Activity** - Select the checkbox to repeat the same event in future.
- **Remind At** - Select the checkbox to set email or pop-up reminders.
- **Description** - Specify additional details about the event.

3. Click **Save**.

To create events from Calendar

1. Click the **Calendar**.
2. In the Calendar page, by default, Day View is displayed. Click the time (for example 08:00 hrs), at which you have to set up a event.
3. In the pop-up dialog, select the event option, type the subject in **Subject** field.
4. Click **Save**.
5. In the *Activity* page, click **Edit** to update the event details.
6. In the *Activity* page, enter the other event related details.
7. Click **Save**.

Note: Events are automatically closed at the specified end date and time. There is no status update for the events.

Create Recurring Activities

An activity can be repeated by using the recurring option while creating the the tasks and events.

To create recurring activities

1. Click the **New Task/Event** link.

   Alternatively, click **New Task/Event** from records such as leads, accounts, contacts, potentials.
2. In the **Create Task/Event** page, specify the activity-related details.

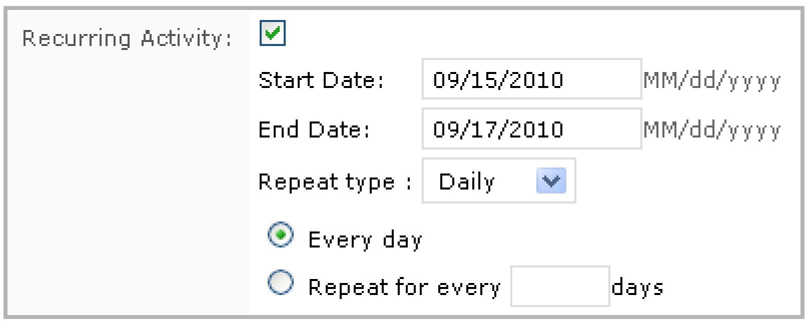


Figure 53: Recurring Activity

3. Select the **Recurring Activity** checkbox and do the following:

   a. Specify the **Start Date** and **End Date** for the activity to be repeated.

   b. Specify the **Repeat Type** for the activity and select the options accordingly.

   c. Click **Save**.

Daily - Fields	Description
Everyday	Select this if the activity should be repeated everyday.
Recur every ___ day(s)	Select this to specify how often in days the activity should be repeated.
Weekly - Fields	Description
Recur every	Enter how often in weeks the activity should be repeated.

____week(s)	
Days of the week	Select the checkbox(es) that correspond to the day(s) of the week on which the recurrence should occur.
Monthly - Fields	Description
On day __ of every ___ month(s)	Enter how often in months and on the specified date the activity should be repeated.
On ____ ____ of every ___ month	Select a particular day when the activity should be repeated every month.
Yearly - Fields	Description
On every ___ ____	Enter how often in a year the activity should be repeated.
On ____ ____ of ____	Enter how often in a year and on the specified date the activity should be repeated.

Set Reminders

While creating a task or event in Zoho CRM, you can set a reminder for it. There are two options for reminders:

- **Alert through Email** - On selecting this option, you can receive reminders for your tasks or events through emails.
- **Alert through Pop up** - On selecting this option, you can receive pop up reminders for your tasks or events.

Note: The Reminder option is available only in the Paid Editions. It is not available in the Free Edition or Trial versions.

To set reminders for tasks

1. In the **Activities** tab, click on the task for which you want to set reminders.
2. In the *Task Details* page, click **Edit**.

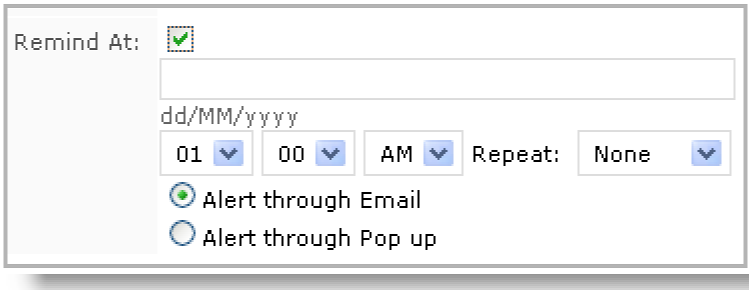


Figure 54: Reminders

3. Select the **Remind At** checkbox and do the following:

    a. Specify the time when you want the reminder.

    b. Specify the recurrence pattern. (Daily, Weekly, Monthly, etc.)

    c. Choose **Alert Through Email** or **Alert Through Pop up** as required.

4. Click **Save**.

To set reminders for events

1. In the **Activities** tab, click on the event for which you want to set reminders.
2. In the *Event Details* page, click **Edit**.

Figure 55: Reminders

3. Select the **Remind At** checkbox and do the following:

    a. Specify the interval of time to receive an alert before the event starts.

    b. Specify the recurrence pattern. (Daily, Weekly, Monthly, etc.)

    c. Choose **Alert Through Email** or **Alert Through Pop up** as required.

4. Click **Save**.

    After creating an event, you can invite users, leads, or contacts for the event by clicking Add Invitees.

Note:

- If an email reminder is set for the event, then the event owner and also **the invitees will get email reminders**.
- If a pop-up reminder is set for the event, then the event owner and also **the users (in your CRM account) added as invitees will get pop-up reminders.**

Add Invitees

To invite multiple users, leads, or contacts to the event

1. In the **Activities** tab, click on the event for which you want to add invitees.
2. In the *Event Details* page, click **Add Invitees**.

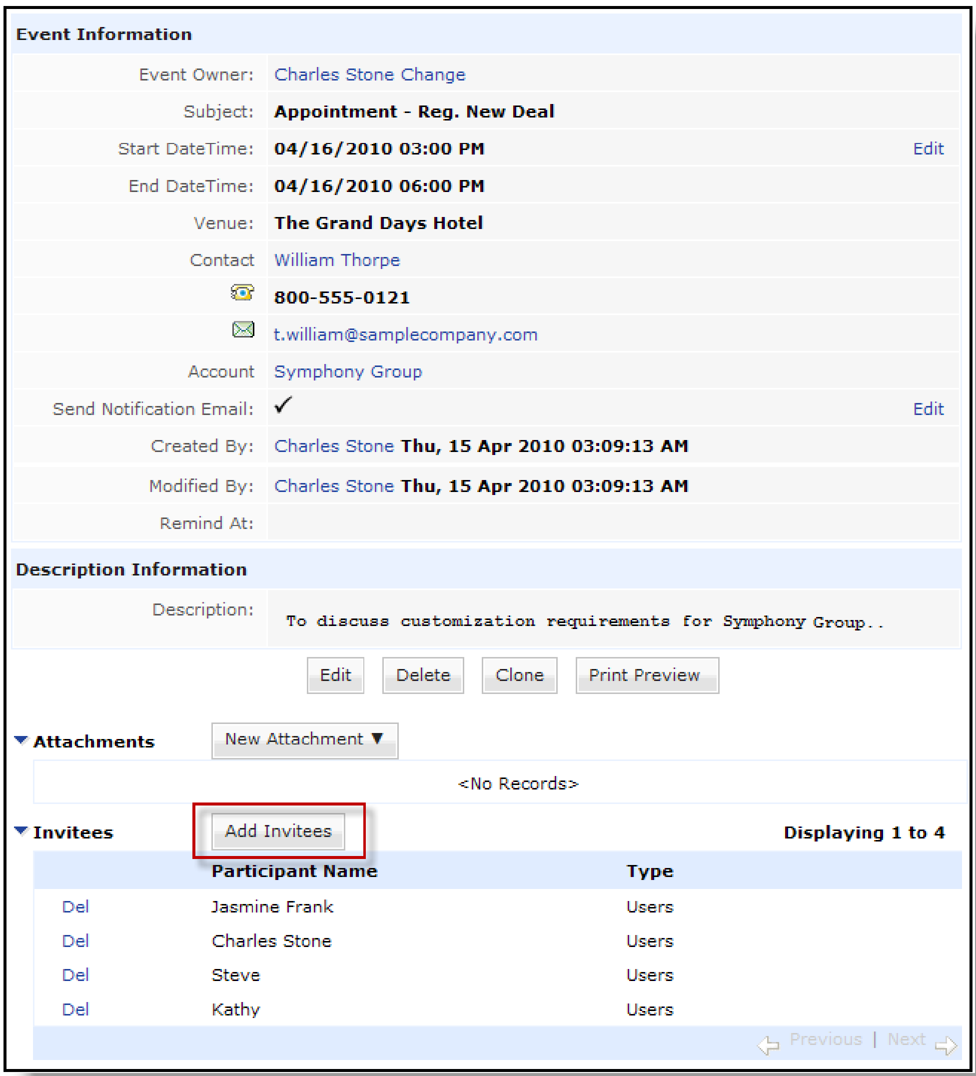


Figure 56: Add Invitees

3. In *Invitees Lookup* popup window, search for **Users**, **Leads**, or **Contacts**.
4. In the list of Users, Leads, or Contacts, select the corresponding checkbox(es).
5. Click **Add** or **Add and Send Email**.

Note:

- If an email reminder is set for the event, then the event owner and also **the invitees will get email reminders.**
- If a pop-up reminder is set for the event, then the event owner and also **the users (in your CRM account) added as invitees will get pop-up reminders.**

CHAPTER 26

LOG CALLS

In This Section:

- Log Inbound & Outbound Calls
- Associate to Other Records

CHAPTER 26

LOG CALLS

The Log a Call functionality helps you to register the inbound (received from leads and customers) and outbound (dialed to leads and customers) call details such as, call duration, date and time of calls, notes, etc. Users who frequently make calls or receive calls in an organization can make use of this functionality in Zoho CRM.

For instance, this is of great help to the Customer Support Executives who often receive calls from their customers. By recording call logs, they can identify the time spent on each call and keep track of the average time spent in calls on a monthly basis. On the other hand, the Sales and Marketing Executives can keep track of all the calls they make to their prospects. The call details can be further used to generate reports on billing details, average time spent on calls, number of calls per day, etc.

Availability

Editions	**Enterprise**	**Professional**	**Free**
	YES	**YES**	**YES**
Permission Required	**Activities Tab**		

Benefit

- Helps identify typical queries asked by users
- Keep track of all the customer calls for future reference.

Log a Call

Using the Log a Call feature in Zoho CRM you can capture the completed and current call details.

To log a current call

1. Click the **New Call** link.

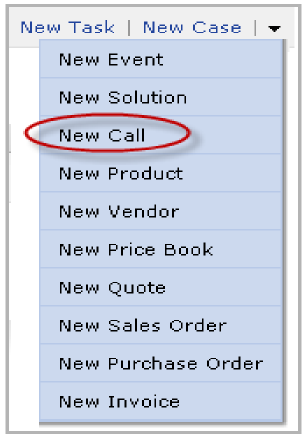


Figure 57: New Call

2. In the *Log a Call* page, specify the details of the call.
3. In the *Time Details* section, click **Current Call**. By default, Current Call is selected

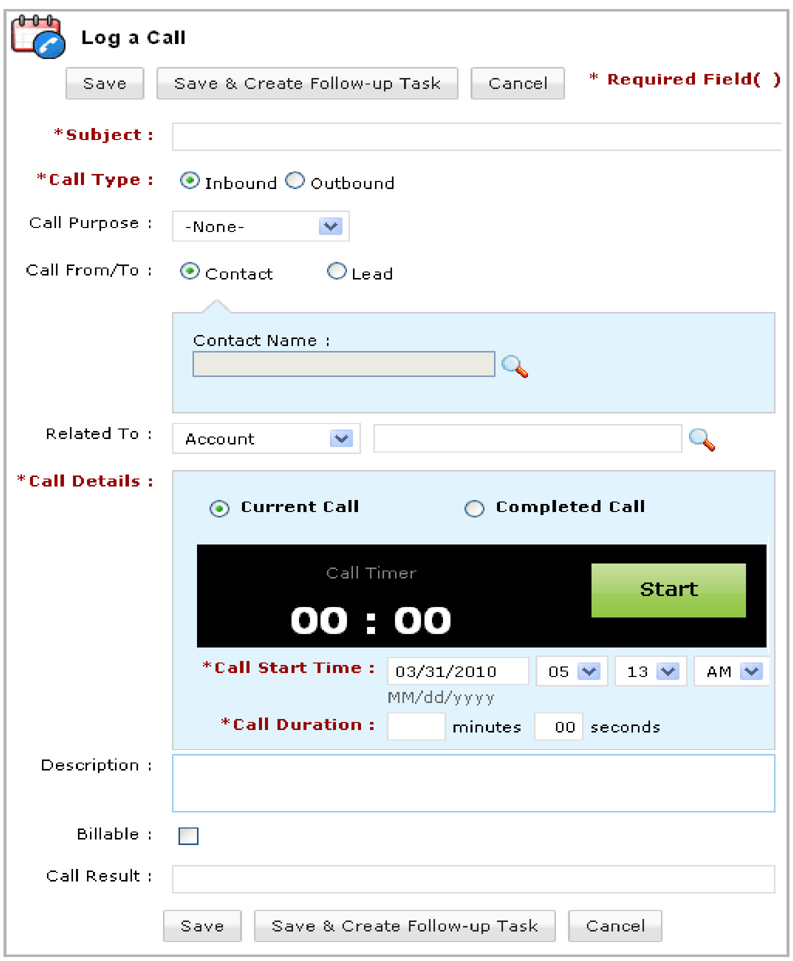


Figure 58: Call Details

4. Click **Start**.

   The call timer indicates the duration of the current call.
5. Click **Stop** when the call is completed.

   The **Call Start Time** and **Call Duration** is automatically updated
6. Click **Save** to save the current call
7. Click **Save & Create Follow-up Task** to save and create a follow-up task.

Notes:

- The **Related To** field will be available only if you are calling a Contact.
- The user who logs a call is the **Call Owner** and you cannot change owner of the call.
- Only users with the permission to edit the call record can modify it.
- The details of the call will be available in the **Activities** tab.

To log a completed call

1. Click the **New Call** link.
2. In the *Log a Call* page, specify the details of the call.
3. In the *Time Details* section, click **Completed Call**. By default, Current Call is selected.
4. Enter the **Call Duration** of the call in minutes and seconds.
5. Click **Save**, or click **Save & Create Follow-up Task** to save and create a follow-up task.

Note:

- The **Related To** field will be available only if you are calling a Contact.
- The details of the call will be available in the **Activities** tab.

Associate calls with CRM records

To associate calls with CRM records

1. Click the **Leads** or **Contacts** tab.
2. Select the record for which you want to log a call.
3. In the *[Record] Details* page, the existing call details, if any, are displayed.

- Click **Subject**, **Activity Type**, **Status**, **Due Date** or **Owner Name** links to sort the display order of the records.
- Click the **Edit** or **Del** link to modify or delete the call details respectively.

4. Click **Log a Call**.

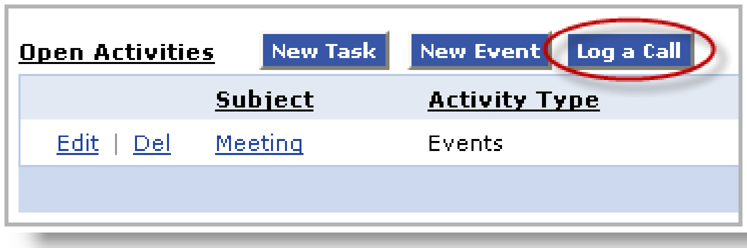


Figure 59: Log a Call

5. In the *Log a Call* page, enter the call related details.
6. Click **Save**, or click **Save & Create Follow-up Task** to save and create a follow-up task.

List of Standard call related fields

In the Log a Call page, you need to specify the call-related information. The following table provides description of the various fields in the page.

Field Name	Description	Data Type
Subject	Enter the subject of the call.	Text Box
Call Type	• Choose **Inbound** for the incoming calls in your organization. • Choose **Outbound** for the outgoing calls in your organization.	Select option
Related To	Choose the type of record to which the call is related and then choose the record.	Drop-down list
Call From/To	Specify to whom the call is made or from whom the call is received.	Select option
Call Purpose	Choose the purpose of the call from the drop-down list.	Pick list
Call Result	Specify the call result	Text Box

Time Details	• Click **Current Call** if the call is in progress. • Click **Completed Call** if the call is completed.	Select option
Call Start Time	Automatically displays the current date and time.	Date and Time
Call Duration	• Displays the call duration for the Current Calls. • For Completed Calls, specify the call duration.	Numeric
Description	Specify the description of the call.	Text Box
Billable	Select the check box if the call is billable.	Check Box

Note: You cannot add custom fields in the Log a Call page. However you can customize the existing fields using page layout customization.